



Report of Findings: 2018 Winter Performance Survey, Freight Survey, & General Public Survey

Methodology – Winter Performance Study



- ▶ Online Survey of Washington State Ferry Riders Opinion Group (FROG)
- ▶ **Conducted March 26th – April 23rd, 2018 regarding their personal experience riding Washington State Ferries during the recent winter travel period (January 7th through March 31st, 2018)**
- ▶ **A Total of 4,214 Interviews were completed**
- ▶ Data was weighted to reflect WSF actual ridership during the 2018 winter period by route, boarding method and ticket type used based on the last trip taken

Please note that due to rounding, some percentages may not add up to exactly 100%.

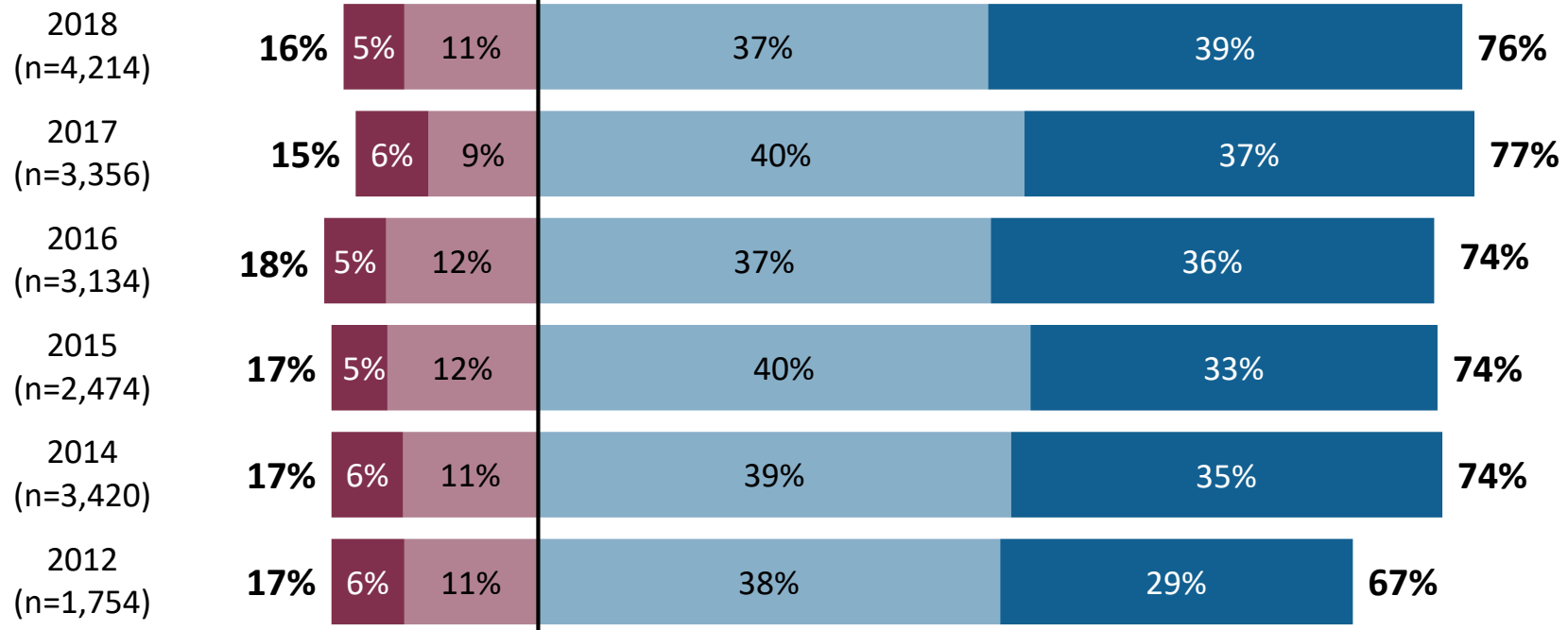
Overall Satisfaction



Overall satisfaction (76%) with the service provided by WSF is strong (37% Satisfied / 39% Extremely Satisfied) and has remained constant for the last 5 years. Dissatisfaction increased 1 percentage points in 2018 to 16%, but the extremely dissatisfied (5%) declined 1 percentage point over 2017.

Overall Satisfaction with WSF

■ Somewhat Dissatisfied ■ Extremely Dissatisfied
■ Somewhat Satisfied ■ Extremely Satisfied



Only ratings of satisfaction (4-5) or dissatisfaction (1-2) are shown, Ratings of 3 or don't know are not shown.
 The **bold** percentages represent the corresponding total dissatisfaction/satisfaction

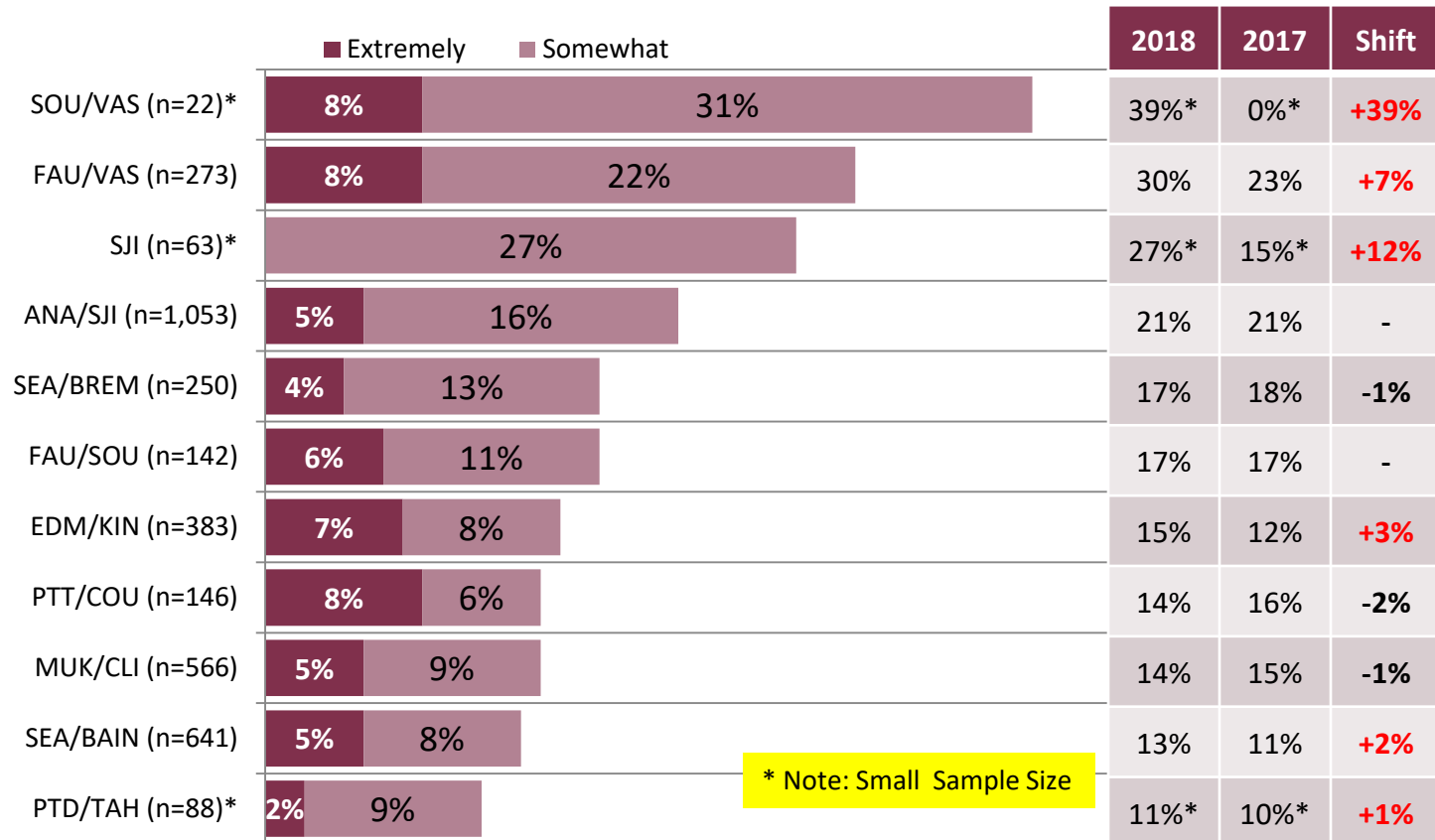
Q1. For this survey, we are interested in your experiences and opinions of Washington State Ferries during the Winter Schedule period, January 7th through March 31st 2018. All things considered, how satisfied are you with the service provided by Washington State Ferries?

Overall Dissatisfaction by Route



Riders on the Southworth/Vashon (39%), Fauntleroy/Vashon (30%) and San Juan Inter-Island* (27%) routes show both an increase in and higher levels of dissatisfaction than other routes. All other route's level of dissatisfaction has remained approximately the same as was found in winter 2017.*

Overall Dissatisfaction by Route (Total Dissatisfied)

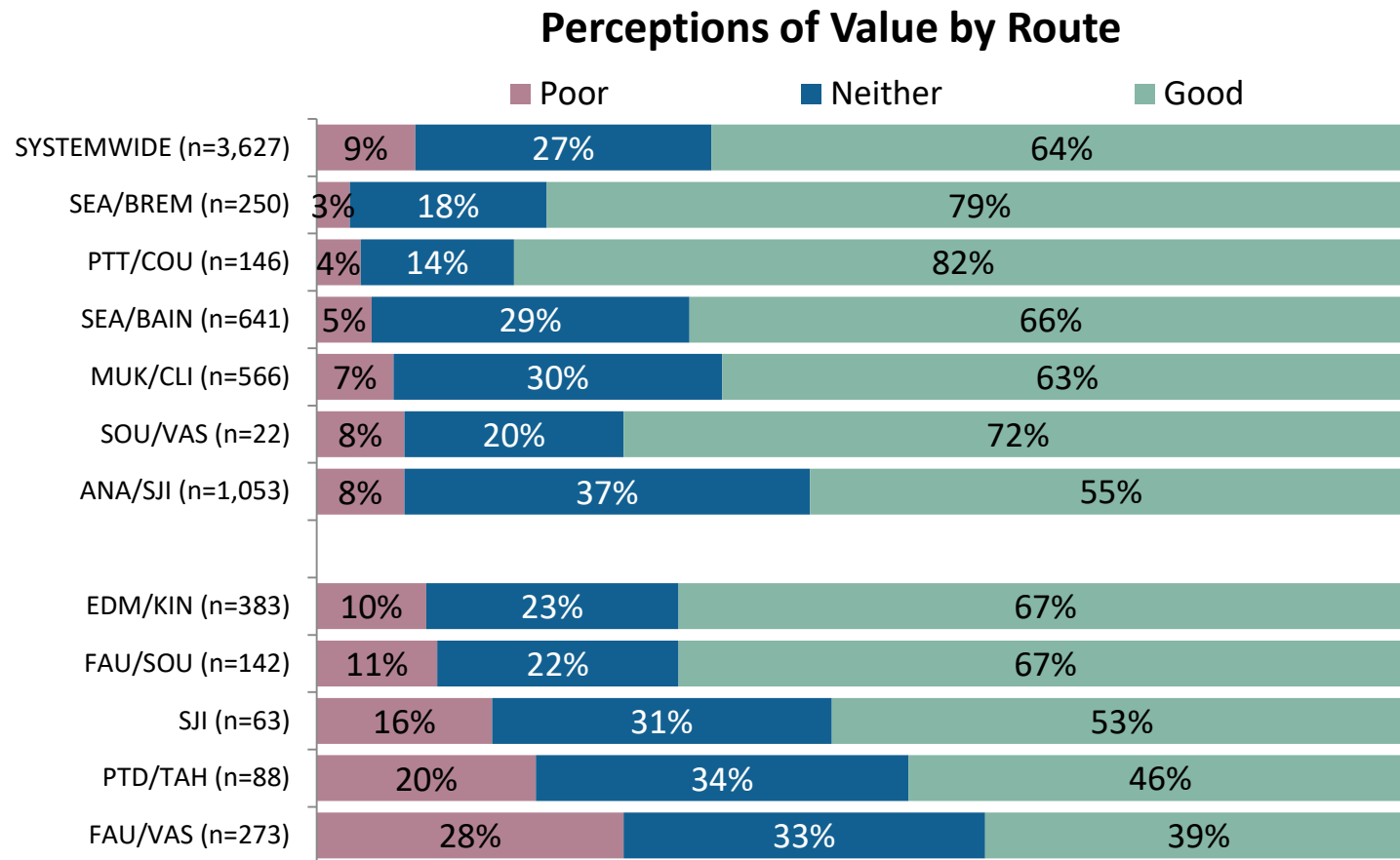


Q1. For this survey, we are interested in your experiences and opinions of Washington State Ferries during the Winter Schedule period, January 7th through March 31st 2018. All things considered, how satisfied are you with the service provided by Washington State Ferries?

Perceived Good Value by Route



Systemwide the vast majority (64%) of riders say WSF is a good value to them. In comparison, 9% say it is a poor value. Seattle/Bremerton (3%), Port Townsend/Coupeville (4%) and Seattle/Bainbridge (5%) had the lowest poor value rating while San Juan Inter-Island (16%), Point Defiance/Tahlequah (20%) and Fauntleroy/Vashon (28%) had the highest rating.



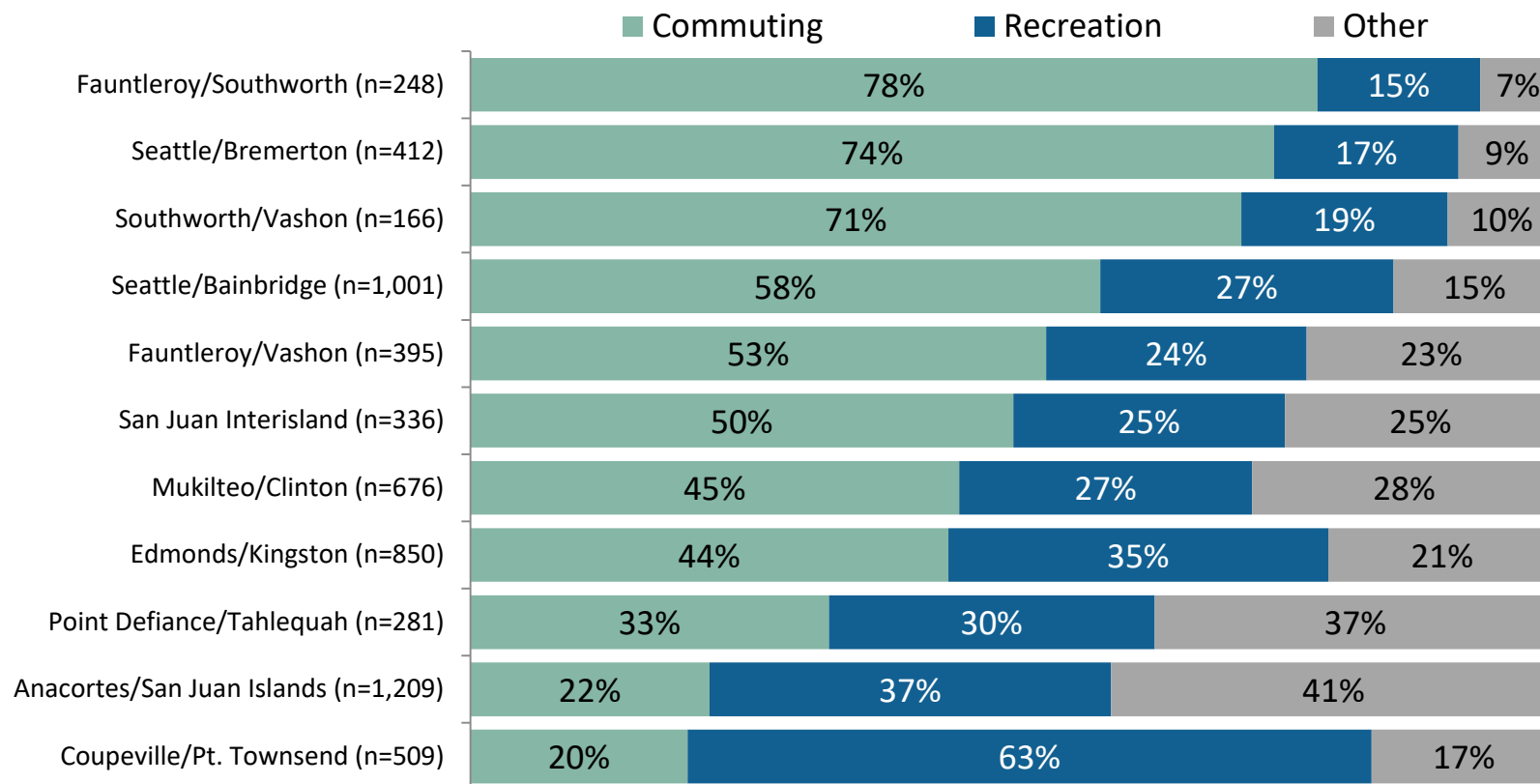
Q116. Considering your personal experience with the ferries, which of the following phrases best describes the value, to you, of riding Washington State Ferries?

Trip Purpose



All routes except Coupeville/Pt. Townsend, Anacortes/San Juan Islands, Point Defiance/Tahlequah are primarily used for commuting. Anacortes/San Juan has a high percentage of “other” trips (shopping, medical appointments, etc.).

Trip Purpose by Route



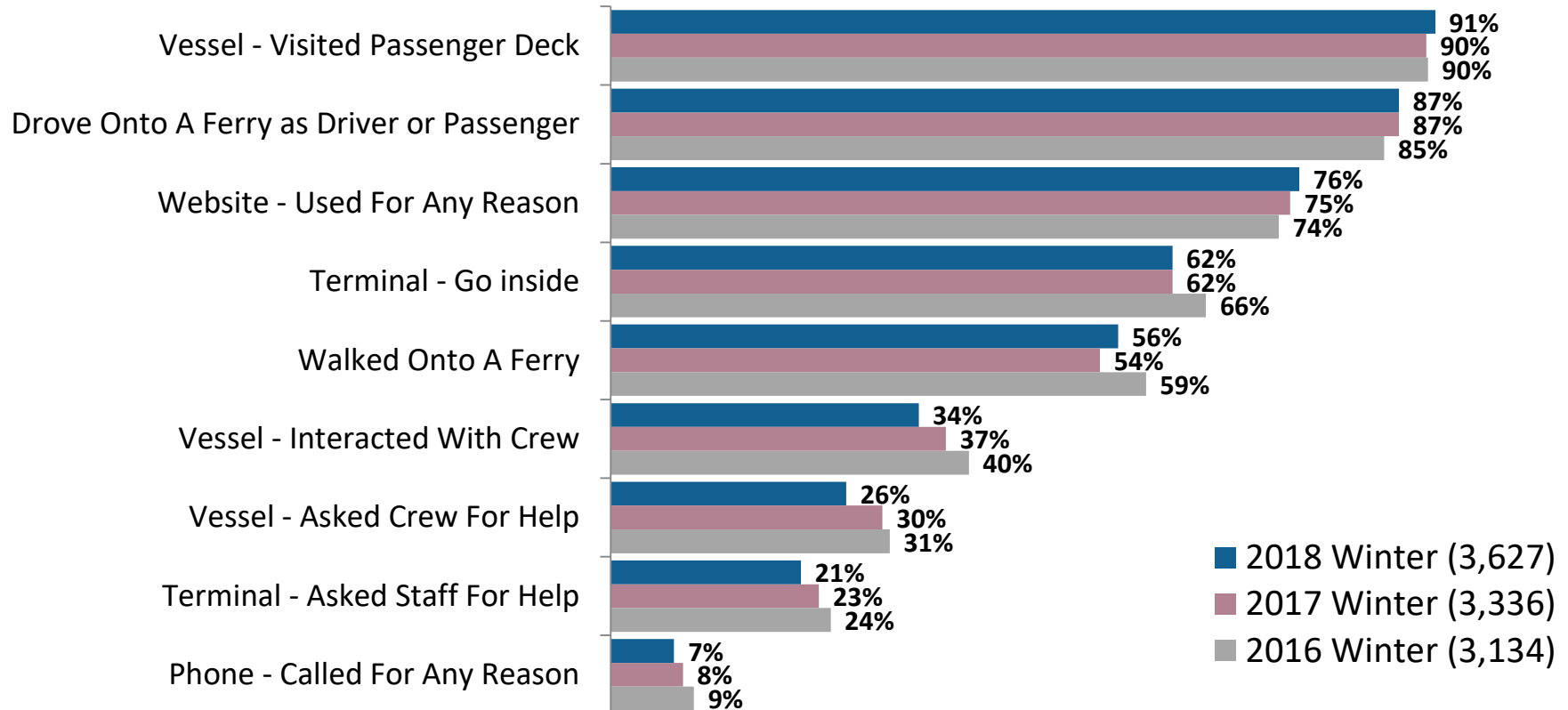
Q4. Approximately how many of those per month round trips, for each route, were for the primary purpose of commuting (getting to and from work/school), how many were primarily recreational/social purposes (seeing friends/going to events, etc.) and how many were for other purposes (shopping, medical appointments, etc.)?

Rider Interaction With WSF



Riders are most likely to visit the passenger vessel deck (91%) and drive onto the ferry (87%). Three quarters (76%) say they have used the WSF website. Riders are least likely to have called WSF customer service (7%). These percentages are unchanged from winter 2017.

WSF Touch Points With Winter Riders



Q(s) During the winter period, did you ... Q20 Go inside a ferry terminal for any reason? Q100 Did you specifically ask a WSF terminal staff member for help/assistance? Q30 Did you walk onto a ferry? Q43 Did you either drive onto a ferry or board as a passenger in a vehicle? Q70 Did you use/visit the vessel passenger deck area? Q80 Did you have any interaction with any of the vessel crew? Q103 Did you specifically ask a WSF vessel staff member for help/assistance? Q90 Use the WSF website? Q93 Call WSF customer service by phone?

All Riders – Dissatisfaction by Attribute



Dissatisfaction on all attributes is largely unchanged except for “terminals are comfortable” which increased. “Adequate parking near terminals” (30%), “terminals are comfortable” (23%) and “terminal bathrooms are clean” (21%) had the highest dissatisfaction levels.

Code	Attributes	Importance (4-5)	Dissatisfaction (1-2)			2016
			2018	2017	Change	
6	Adequate parking near terminals	77%	30%	30%	-	31%
2	Terminals are comfortable	84%	23%	17%	+6%	17%
4	Terminal bathrooms are clean	96%	21%	20%	+1%	20%
5	WSF and transit schedules coordinated	69%	14%	13%	+1%	15%
16	Loading crews provide clear directions	95%	13%	13%	-	14%
12	Efficiently processes vehicles	96%	12%	12%	-	11%
14	Vehicle loading procedures efficient	95%	10%	10%	-	9%
15	Loads ferries to capacity	90%	10%	10%	-	9%
8	Passenger loading efficient	90%	9%	10%	-1%	11%
7	Easy loading/ unloading for walk-on	91%	9%	9%	-	11%
9	Passenger unloading efficient	90%	9%	8%	+1%	9%
1	Terminals are clean	93%	9%	8%	+1%	7%
25*	Terminal to vessel walkway is safe	90%	9%			
26*	Dock-side holding area fully utilized	85%	8%			
21	Ferries bathrooms are clean	98%	8%	7%	+1%	8%
13	Vehicle loading crew is friendly	86%	7%	7%	-	6%
3	Terminal staff is helpful	86%	7%	8%	-1%	8%
11	Buying tickets easy and quick	95%	6%	6%	-	6%
18	Vehicle unloading procedures efficient	94%	5%	6%	-1%	7%
22	Vessels are well maintained	96%	5%	5%	-	8%
20	Passenger seating areas are clean	96%	5%	4%	+1%	5%
19	Unloading crews provide clear direction	94%	4%	5%	-1%	5%
23	Vessel crew is friendly	97%	4%	3%	+1%	4%
24	Vessel crew is helpful	98%	4%	4%	-	3%
10	Toll booth staff is friendly	90%	3%	4%	-1%	3%
17	Unloading crew is friendly	86%	2%	4%	-2%	3%

- ❖ This table gives an overview of the individual attribute quad charts that follow
- ❖ For each attribute, the table shows:
 - The percent of people who rated the attribute as 4 or 5 on the Importance scale
 - Total dissatisfaction (1-2) for **Winter 2018, Winter 2017** and **Winter 2016**
 - The **Change** in dissatisfaction from 2017 to 2018. **Red** indicates **greater dissatisfaction** in 2018 than in 2017.
 - * New attributes added in 2018

Summary of Attribute Dissatisfaction by Route

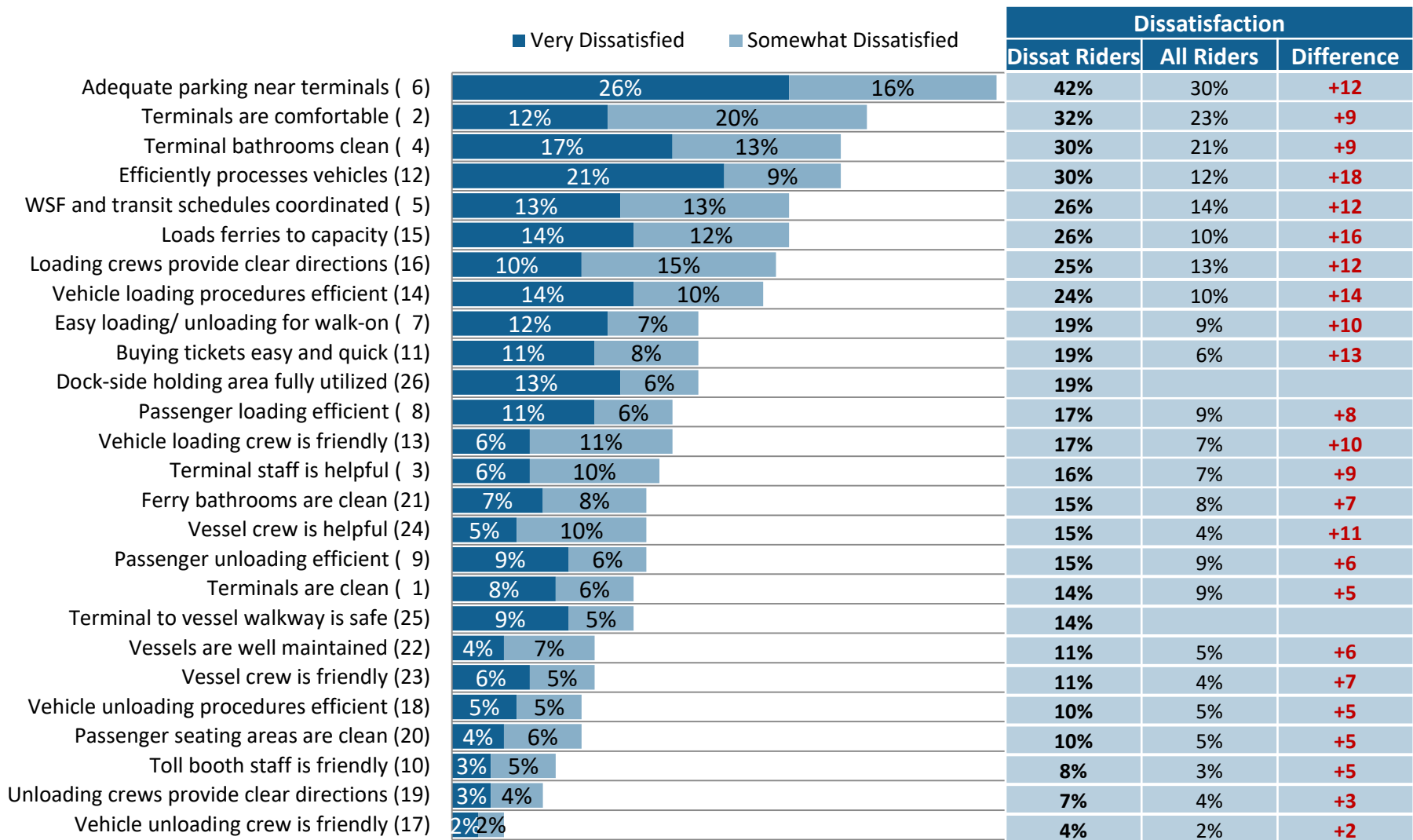


			Dissatisfaction by Route										
Color Code: Dissatisfaction Light (10-19%), Medium (20-29%), Heavy (>30%)	Import (4-5)	Dissat. (1-2)	SEA/ BAIN	SEA/ BRE	PTD/ TAH	EDM/ KIN	FAU/ VAS	FAU/ SOU	SOU/ VAS	PTT/ COU	MUK/ CLI	ANA/ SJI	INTER SJI
Number of Respondents Varies by Question (Max n Shown)	4,214	4,214	641	250	88	383	273	142	22	146	566	1,053	63
Adequate parking near the terminals (attribute code # 6)	77%	30%	19%	30%	41%	20%	55%	23%	29%	30%	57%	10%	0%
Terminals are comfortable (2)	84%	23%	35%	28%	22%	17%	15%	8%	20%	6%	8%	15%	10%
Bathrooms in the terminals are clean and well maintained (4)	96%	21%	35%	32%	13%	11%	7%	3%	3%	1%	7%	13%	18%
Sailing schedule is adequately coordinated w/transit services (5)	69%	14%	7%	25%	27%	15%	15%	13%	26%	5%	12%	36%	15%
Vehicle loading crews provide clear directions/hand signals (16)	95%	13%	12%	5%	24%	9%	21%	13%	17%	5%	15%	15%	23%
Efficiently processes vehicles through ticket lanes (12)	96%	12%	10%	6%	31%	7%	45%	19%	15%	1%	4%	10%	21%
Vehicle loading procedures are efficient (14)	95%	10%	6%	7%	26%	6%	29%	15%	24%	4%	7%	10%	13%
Loads ferries to capacity with little room between vehicles (15)	90%	10%	7%	4%	22%	6%	27%	15%	50%	5%	7%	8%	16%
Walk-on passenger loading procedures are efficient (8)	90%	9%	11%	13%	6%	3%	6%	12%	0%	3%	9%	4%	0%
Provides easy loading/unloading for walk-on passengers (7)	91%	9%	11%	10%	3%	3%	6%	16%	9%	5%	12%	4%	9%
Walk-on passenger unloading procedures are efficient (9)	90%	9%	13%	7%	3%	1%	5%	15%	0%	1%	12%	6%	2%
Terminals are clean and well maintained (1)	93%	9%	18%	15%	2%	3%	2%	3%	0%	0%	1%	4%	0%
Terminal to vessel walkway is safe (25)	90%	9%	9%	10%	3%	5%	2%	15%	0%	6%	18%	5%	11%
Dock-side holding area fully utilized (26)	85%	8%	5%	2%	21%	3%	27%	18%	32%	1%	3%	4%	4%
Bathrooms on the ferries are clean and well maintained (21)	98%	8%	9%	12%	4%	10%	4%	5%	7%	3%	5%	8%	5%
Vehicle loading crew is friendly, courteous and polite (13)	86%	7%	6%	4%	15%	5%	8%	4%	11%	4%	10%	11%	13%
Terminal staff is helpful, competent and knowledgeable (3)	86%	7%	8%	10%	20%	4%	5%	5%	12%	1%	6%	5%	8%
WSF makes buying tickets easy and quick (11)	95%	6%	4%	4%	22%	3%	21%	7%	13%	1%	2%	6%	5%
Vehicle unloading procedures are efficient (18)	94%	5%	4%	4%	24%	7%	5%	5%	2%	2%	3%	5%	5%
Vessels are well maintained and safe (22)	96%	5%	5%	5%	0%	5%	8%	5%	15%	4%	3%	15%	10%
Ferry passenger seating areas are clean/comfortable (20)	96%	5%	3%	23%	2%	6%	2%	5%	9%	1%	1%	7%	5%
Vehicle unloading crew provide clear direction/hand signals (19)	94%	4%	2%	2%	14%	4%	4%	7%	2%	2%	3%	4%	4%
Vessel crew is friendly, courteous and polite (23)	97%	4%	2%	2%	1%	7%	5%	0%	3%	5%	6%	6%	0%
Vessel crew is helpful, competent, knowledgeable (24)	98%	4%	3%	5%	7%	5%	7%	0%	3%	1%	5%	5%	0%
Toll booth staff is friendly, courteous and polite (10)	90%	3%	3%	1%	2%	3%	7%	3%	2%	1%	1%	5%	5%
Vehicle unloading crew is friendly, courteous and polite (17)	86%	2%	1%	1%	12%	2%	1%	2%	2%	1%	2%	3%	0%

Dissatisfied Riders – Dissatisfaction by Attribute



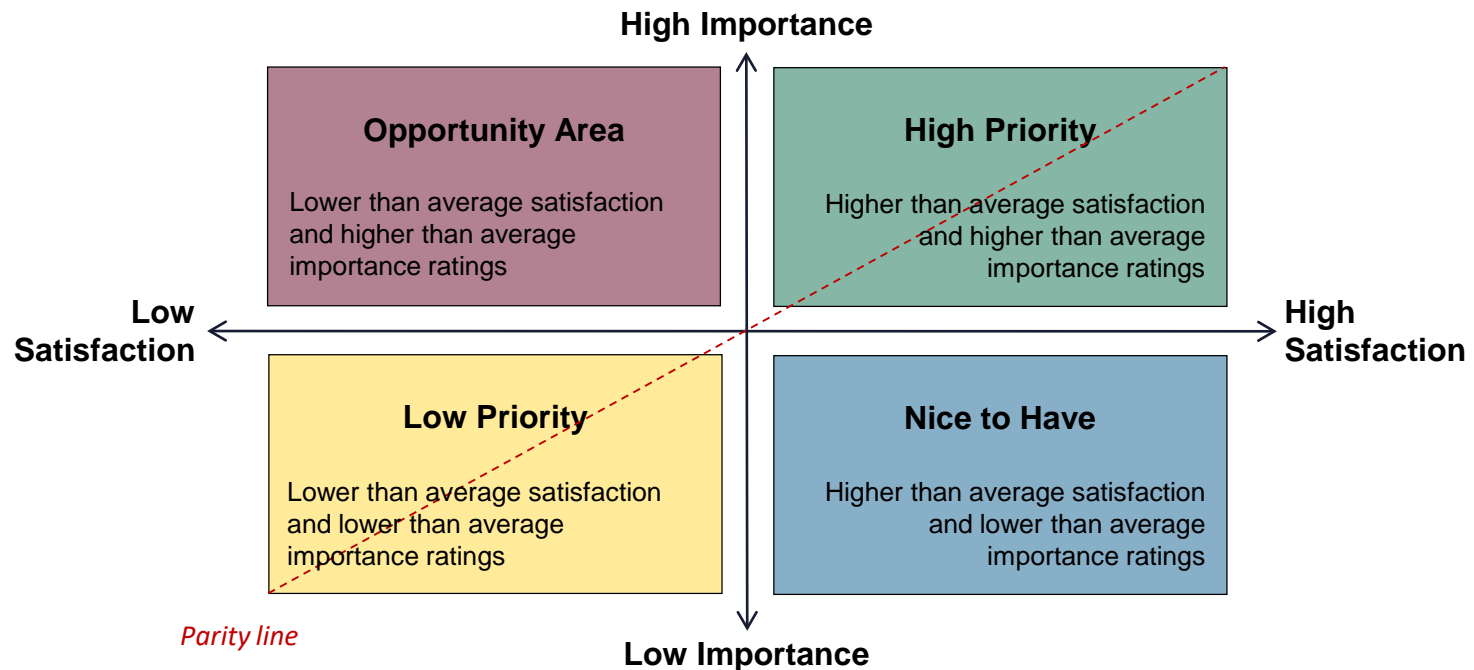
As expected, riders who are dissatisfied with WSF overall have higher dissatisfaction levels on every individual attribute tested. By far, dissatisfied riders are most unhappy with parking availability (42%).



Gap Analysis



- ❖ The following slides present quadrant charts comparing the relative satisfaction for each ferry attribute to the relative importance of that attribute.
 - The two sample sizes shown on each chart represent the maximum and minimum number of riders rating any given attribute, due to embedded skip logic.
- ❖ Each quad chart consists of four quadrants:
 - Opportunity area (red) | High priority (green) | Nice to have (blue) | Low priority (yellow)
- ❖ Each quad chart is also overlaid with a parity line.
 - The parity line represents where importance and satisfaction are equal, and identifies the ferry attributes with the greatest disparity between satisfaction and importance.
- ❖ Attributes considered important, but with low satisfaction (performance), are opportunity areas for WSF. Increasing awareness of these important attributes may help promote more positive impressions of the ferry system, and boost overall satisfaction.



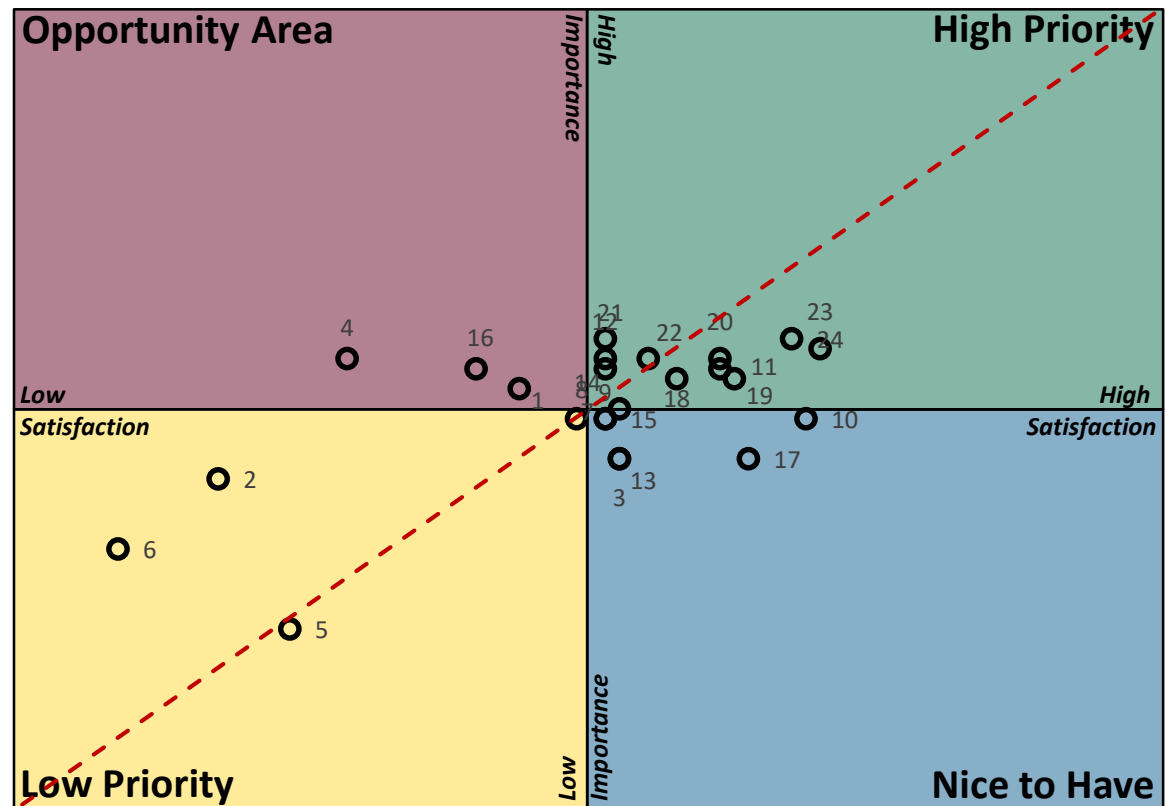
Gap Analysis: Overall - 2018



Opportunity Areas: Similar to past years, terminal bathroom cleanliness (4) and clear loading crew directions (16) are the key opportunity areas. While of lower priority to riders, the amount of parking near terminals (6) and terminals are comfortable (2) are underperforming by a wide margin.

	Attribute Key
1	Terminals are clean
2	Terminals are comfortable
3	Terminal staff is helpful
4	Terminal bathrooms clean
5	WSF and transit schedules coordinated
6	Adequate parking near terminals
7	Easy loading/ unloading for walk-on
8	Passenger loading efficient
9	Passenger unloading efficient
10	Toll booth staff is friendly
11	Buying tickets easy and quick
12	Efficiently processes vehicles
13	Vehicle loading crew is friendly
14	Loading procedures efficient
15	Loads ferries to capacity
16	Loading crews provide clear directions
17	Unloading crew is friendly
18	Unloading procedures efficient
19	Unloading crews provide clear directions
20	Passenger seating areas are clean
21	Ferries bathrooms are clean
22	Vessels are well maintained
23	Vessel crew is friendly
24	Vessel crew is helpful

Satisfaction vs. Importance Ratings (n=1,278-3,490)



The Terminals are Comfortable



Dissatisfaction continues to be the highest in Seattle/Bainbridge (35%) followed by Seattle/Bremerton (28%) for terminals are comfortable. The vast majority of that dissatisfaction for the Seattle terminal.*

Ratings on a 5 point scale (1=low, 5=high)		TOTAL	SEA/ BAIN	SEA/ BRE	PTD/ TAH	EDM/ KIN	FAU/ VAS	FAU/ SOU	SOU/ VAS	PTT/ COU	MUK/ CLI	ANA/ SJI	INTER SJI
Respondents		2122	514	178	46	196	192	80	18	103	293	456	41
The terminals are comfortable (seating, temperature, etc.)	Imp. (4-5)	84%	87%	90%	78%	81%	83%	78%	77%	80%	81%	84%	83%
	Sat. (4-5)	46%	33%	23%	62%	54%	51%	72%	60%	63%	74%	53%	62%
	Dissat. (1-2)	23%	35%	28%	22%	17%	15%	8%	20%	6%	8%	15%	10%
2017	Dissat.	17%	22%	26%	18%	16%	11%	7%	0%	2%	8%	18%	10%
Change	Dissat.	+6	+13	+2	+4	+1	+4	+1	+20	+4	-	-3	-

**Among those routes that have a substantial number of respondents.*

Top 5 Unsatisfactory Terminals	
Seattle	75%
Bainbridge	12%
Fauntleroy	12%
Vashon	6%
Kingston	5%

Example of Verbatim Complaints – (complete sorted verbatims in separate document)

Anacortes - The terminals are not user friendly. I have watched visitors who were confused and frustrated by not being able to either get service (due to staff cut backs) or not able to easily see instructions. So embarrassing.

Anacortes - That terminal should have been replaced years ago. Uncomfortable seating. Drafty. Unpleasant atmosphere. Poor lighting. Overall very unpleasant, out-dated, and depressing.

Seattle - holding/waiting area chairs are incredibly uncomfortable and not conducive to either privacy or socializing. Sometimes you are stuck there for an hour waiting, especially at night when you're also tired.

Seattle - The reduction of tables, chairs and general seating which is an obvious attempt to run people without homes out of the ferry terminal is troubling. Not only are the signs indicating areas restricted only to ticketholders unfriendly to those who do ride

Seattle - is pretty limited and not very comfortable nor particularly clean and the terminal is not well-heated. Waiting more than 20 minutes at night in the winter at Colman Dock is a pretty big bummer.

Fauntleroy - Come on. The terminal is very small and way past outdated. Very uncomfortable seating, bathroom is small and always a mess. The exit through turnstiles door is always open, making it cold and uncomfortable in the terminal.

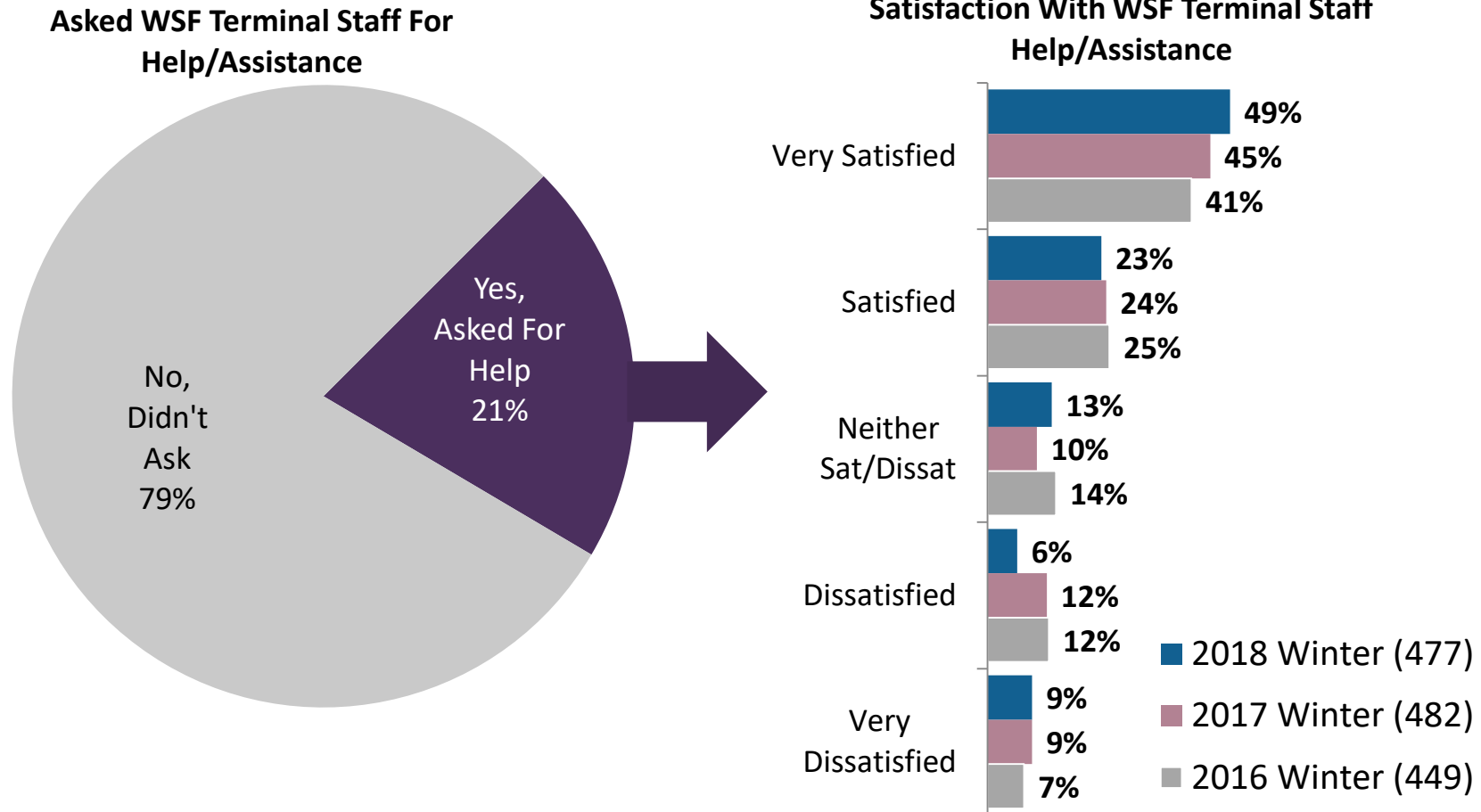
Fauntleroy - The seating in this terminal is very uncomfortable for my bad back, and when walking on my back is already cranky from carrying bags. I would prefer a variety of bench styles so people could choose.

Attribute Key Code - 2
Overall Gap Analysis:
Low Priority Area

Help/Assistance From Terminal Staff



A little less than one in four riders have asked the terminal staff for help (23%) and most (72%) say they are satisfied with the assistance they received. Just one in five (21%) were dissatisfied with the terminal staff performance.



Q100. Did you specifically ask a WSF terminal staff member for help/assistance during the Winter period (January 7th through March 31st 2018)?

Q101. How satisfied were you with the help/assistance the WSF terminal staff member gave you?

Terminal Bathrooms Clean & Well Maintained



Dissatisfaction is highest for Seattle/Bainbridge (35%) and Seattle/Bremerton (32%) followed by Anacortes/San Juan (13%) and Edmond/Kingston (11%). The Seattle terminal continues to receive the vast majority of negative mentions.*

Ratings on a 5 point scale (1=low, 5=high)		TOTAL	SEA/ BAIN	SEA/ BRE	PTD/ TAH	EDM/ KIN	FAU/ VAS	FAU/ SOU	SOU/ VAS	PTT/ COU	MUK/ CLI	ANA/ SJI	INTER SJI
Respondents		2122	514	178	46	196	192	80	18	103	293	456	41
The bathrooms in the terminals are clean and well maintained	Imp. (4-5)	96%	96%	96%	99%	95%	97%	92%	100%	97%	96%	93%	90%
	Sat. (4-5)	55%	37%	20%	81%	71%	79%	79%	67%	83%	78%	64%	46%
	Dissat. (1-2)	21%	35%	32%	13%	11%	7%	3%	3%	1%	7%	13%	18%
2017	Dissat.	20%	30%	35%	20%	13%	7%	6%	0%	5%	8%	15%	12%
Change	Dissat.	+1	+5	-3	-7	-2	-	-3	+3	-4	-1	-2	+6

**Among those routes that have a substantial number of respondents.*

Top 5 Unsatisfactory Terminals	
Seattle	82%
Bremerton	11%
Edmonds	4%
Anacortes	4%
Bainbridge	4%

Example of Verbatim Complaints – (complete sorted verbatims in separate document)

Anacortes - The toilets are clean at the terminal but they are cramped, cold and really need to be overhauled, just as the whole terminal needs attention.

Bremerton - The bathroom always stinks like someone has been smoking pot in it overnight. Also one or more of the stalls has been closed due to vandalism quite a bit. Lately a guard has been on duty in the terminal so it hasn't been as bad.

Edmonds - Bathrooms are frequently dirty, toilets dirty and no towels to dry your hands, just the useless air dryers.

Fauntleroy - No noticeable heat. Women's bathroom door always propped open and the men's is always closed. Not a comfortable feeling that everyone in the lobby can hear your personal business (females) and males personal business remains personal.

Mukilteo - The bathrooms always always always smells like there is a pool of urine in there. Summertime when the window is open and the fan is supposed to be on it smells. Winter time with the windows closed it smells. It just always smells awful in there.

Point Defiance - Reopen and maintain the bathrooms! It is ridiculous there is no restroom at the terminal. Porta Potties are not acceptable for such a public use area.

Seattle - This is all being improved so really at this point doesn't matter, but the Seattle bathrooms are filthy and scary and I hate to have use them and mostly will wait till I'm on the ferry

Seattle - Paper towels and water all over the place. Filled toilets. In general, I avoid the Seattle terminal restroom unless absolutely necessary. Other terminal bathrooms are generally satisfactory.

Attribute Key Code - 4
Overall Gap Analysis:
Opportunity Area

Sailing Schedule Coordinated w/Transit



Dissatisfaction is highest for Anacortes/San Juan Island (36%) followed by Seattle/Bremerton (25%). All routes (except Seattle/Bainbridge (7%) and Port Townsend/Coupeville (5%) received double digit dissatisfaction scores.*

Ratings on a 5 point scale (1=low, 5=high)		TOTAL	SEA/ BAIN	SEA/ BRE	PTD/ TAH	EDM/ KIN	FAU/ VAS	FAU/ SOU	SOU/ VAS	PTT/ COU	MUK/ CLI	ANA/ SJI	INTER SJI
Respondents		1786	498	179	44	198	149	61	15	53	255	291	43
WSF sailing schedule is adequately coordinated with transit services available at the terminal	Imp. (4-5)	69%	67%	65%	67%	60%	87%	79%	100%	73%	72%	75%	80%
	Sat. (4-5)	51%	58%	42%	47%	47%	59%	34%	36%	63%	55%	26%	43%
	Dissat. (1-2)	14%	7%	25%	27%	15%	15%	13%	26%	5%	12%	36%	15%
2017	Dissat.	13%	10%	13%	23%	19%	13%	18%	0%	2%	6%	36%	44%
Change	Dissat.	+1	-3	+12	+4	-4	+2	-5	+26	+3	+6	-	-29

**Among those routes that have a substantial number of respondents.*

Top 5 Unsatisfactory Terminals		Example of Verbatim Complaints – (complete sorted verbatims in separate document)	
Seattle	42%	Anacortes - 1. Poor coordination with airport shuttle; 2. First ferry of the morning from Orcas gets in too late to catch Amtrak in Mt Vernon although Lopez and Friday Harbor generally do; 3. Only fair coordination with transit.	
Fauntleroy	13%	Anacortes - Air porter to/ from SeaTac schedule does not change, but ferry schedule does. Sometimes the schedule is convenient, while other times it is VERY inconvenient. It would be nice to coordinate with them.	
Bremerton	11%	Bremerton - Ferry arrives in Bremerton at 3:50PM. Kitsap Transit buses designated as 'ferry take home' sit at the ferry terminal until 4:05. Other 'ferry take home' for the later ferry runs leave the terminal as soon as the walk off ramps are clear.	
Anacortes	9%	Bremerton - I use Kitsap Transit bus #24 to/from the ferry terminal in Bremerton. Some times the bus is scheduled to meet and leave the terminal at the exact time the ferry is scheduled to arrive, so causing me to have to wait an hour to catch the next one.	
Mukilteo	8%	Fauntleroy - Coordination with the c line bus to downtown from Fauntleroy is poor. Bus is often seen leaving the stop during the passenger unloading process requiring up to a 25 minute wait on weekends for the next bus.	
		Seattle - the Chimacum is ALWAYS late- ALWAYS! People cannot consistently show up late for work, and it is unreasonable to have to take the earlier ferry just because a crew cannot keep a schedule.	
		Seattle - The ferry arrives with barely enough time for me to make the 550 bus in the bus tunnel. If we are late, or passengers are slow unloading I miss it. Although this bus runs every ten minutes, traffic ten minutes later makes me 20-30 minutes later to work.	

Attribute Key Code - 5
Overall Gap Analysis:
Low Priority Area

Adequate Parking Near Terminals



Dissatisfaction is highest for Mukilteo/Clinton (57%) and Fauntleroy/Vashon (55%) followed by Seattle/Bremerton (30%). All routes (except San Juan Inter-Island performed poorly on adequate parking near terminal.*

Ratings on a 5 point scale (1=low, 5=high)		TOTAL	SEA/ BAIN	SEA/ BRE	PTD/ TAH	EDM/ KIN	FAU/ VAS	FAU/ SOU	SOU/ VAS	PTT/ COU	MUK/ CLI	ANA/ SJI	INTER SJI
Respondents		1786	498	179	44	198	149	61	15	53	255	291	43
There is adequate parking near the terminals	Imp. (4-5)	77%	72%	72%	85%	83%	76%	88%	96%	88%	86%	76%	100%
	Sat. (4-5)	39%	44%	47%	35%	48%	17%	26%	51%	48%	19%	55%	89%
	Dissat. (1-2)	30%	19%	30%	41%	20%	55%	23%	29%	30%	57%	10%	0%
2017	Dissat.	30%	19%	24%	34%	25%	45%	17%	46%	43%	58%	20%	10%
Change	Dissat.	-	-	+6	+7	-5	+10	+6	-17	-13	-1	-10	-10

**Among those routes that have a substantial number of respondents.*

Top 5 Unsatisfactory Terminals		Example of Verbatim Complaints – (complete sorted verbatims in separate document)	
Seattle	24%	Bainbridge - The upper parking lot (the cheap one) is cramped and hard to get in and out of. The concrete is broken and needs repair.	
Mukilteo	23%	Bainbridge - The lots are full after the 11:30am sailing. There is then NOWHERE legal to park.	
Bainbridge	18%	Clinton - There is a long walk down - or, when returning, up - a steep hill to get to the nearest public parking lot.	
Fauntleroy	17%	Clinton - The pay parking at the Clinton terminal went up-- there is no where reasonably close to park and it is difficult to meet and pick up passengers off the ferry.	
Bremerton	15%	Coupeville, Mukilteo - Not enough spaces to leave your car on the Coupeville ferry side. It used to be possible to leave a car on the receiving end and not have to wait in ferry lines on the Mukilteo ferry. All the good parking is gone from Mukilteo.	
		Edmonds - There is nominal parking for ferry riders and the cost is high. Sounder has free parking and has taken over the majority of parking within a reasonable distance.	
		Mukilteo - Specifically, because there is NO parking at Mukilteo. Family members who wanted to come to our house for Easter had to cancel because the lines were so long and there was NO PARKING ANYWHERE.	
		Seattle, Bainbridge - There's nothing there. What there is, is outrageously expensive. On Bainbridge, there's a sea of spaces, all full, and again, much too expensive considering how terrible the options for public transportation are.	

Attribute Key Code - 6
Overall Gap Analysis:
Low Priority Area

Easy Loading/Unloading for Walk-on



Dissatisfaction is highest for Mukilteo/Clinton (12%), Seattle/Bainbridge (11%) and Seattle/Bremerton (10%). Seattle and Bainbridge terminals are cited most often.*

Ratings on a 5 point scale (1=low, 5=high)		TOTAL	SEA/ BAIN	SEA/ BRE	PTD/ TAH	EDM/ KIN	FAU/ VAS	FAU/ SOU	SOU/ VAS	PTT/ COU	MUK/ CLI	ANA/ SJI	INTER SJI
Respondents		1786	498	179	44	198	149	61	15	53	255	291	43
WSF provides easy loading and unloading for walk-on passengers	Imp. (4-5)	91%	93%	94%	67%	87%	90%	86%	100%	90%	93%	88%	100%
	Sat. (4-5)	74%	68%	76%	73%	82%	85%	78%	87%	87%	66%	79%	70%
	Dissat. (1-2)	9%	11%	10%	3%	3%	6%	16%	9%	5%	12%	4%	9%
2017	Dissat.	9%	12%	8%	6%	4%	4%	2%	12%	4%	14%	6%	10%
Change	Dissat.	-	-1	+2	-3	-1	+2	+14	-3	+1	-2	-2	-1

**Among those routes that have a substantial number of respondents.*

Top 5 Unsatisfactory Terminals		Example of Verbatim Complaints – (complete sorted verbatims in separate document)											
Seattle	58%	Bainbridge - too long a walk with packages at the Bainbridge terminal.											
Bainbridge	26%	Bermerton - Crazy bottleneck ramp with a Z-shaped pathway, often a steep step onto the ramp from the boat, so people with wheeled objects (rolling bags, wheelchairs, strollers) get stuck and the crowd makes it hard.											
Mukilteo	15%	Fauntleroy, Vashon - There is virtually no regard whatsoever given to bicyclists at these ferry docks. There is nowhere we are allowed to ride except in the auto traffic lanes, and generally cars and motorcycles begin unloading while bicyclists unloading.											
Bremerton	13%	Mukilteo - many times walk-ons struggle up the roadway and simply do not use the passenger gate when they come to it but keep on walking up the roadway while all vehicle s are waiting to get off.											
Clinton	12%	Orcas - Walkers have to stand in the pollution of disembarking cars and trucks to walk-on the ferry at the proper time. It used to be that embarking walk-ons could walk on as the disembarking ones walked off. That was far more pleasant and efficient.											
		Seattle - The time it takes to unload walk on passengers seems excessive. Cars are often driving off before the staff has the gates open and plank lowered.											
		Seattle - The ticket scanning process is insufferable; the ramp is too small and there is a choke point before the boat ramp. There is nothing easy about loading from Seattle.											
		Seattle - The terminal, which is in the process of being replaced, turns into a mob scene where you can't easily get to the luggage gate, and if you sit to wait, then you have to push into a crowd when the ferry arrives.											

Attribute Key Code - 7
Overall Gap Analysis:
High Priority Area

Efficiently Process Vehicles



*Dissatisfaction is highest for Fauntleroy/Vashon (45%) and Southworth/Fauntleroy (15) *. The Fauntleroy terminal is cited by the vast majority of dissatisfied riders.*

Ratings on a 5 point scale (1=low, 5=high)		TOTAL	SEA/ BAIN	SEA/ BRE	PTD/ TAH	EDM/ KIN	FAU/ VAS	FAU/ SOU	SOU/ VAS	PTT/ COU	MUK/ CLI	ANA/ SJI	INTER SJI
Respondents		3189	524	174	80	351	257	127	18	127	517	954	60
WSF efficiently processes vehicles through ticket lanes	Imp. (4-5)	96%	97%	94%	98%	94%	97%	90%	97%	97%	96%	97%	88%
	Sat. (4-5)	73%	76%	82%	55%	81%	31%	66%	56%	92%	83%	72%	59%
	Dissat. (1-2)	12%	10%	6%	31%	7%	45%	19%	15%	1%	4%	10%	21%
2017	Dissat.	12%	10%	4%	11%	5%	47%	22%	57%	4%	7%	13%	3%
Change	Dissat.	-	-	+2	+20	+2	-2	-3	-42	-3	-3	-3	+18

**Among those routes that have a substantial number of respondents.*

Top 5 Unsatisfactory Terminals		Example of Verbatim Complaints – (complete sorted verbatims in separate document)											
Fauntleroy	53%	Anacortes - Ticket booth attendants can be overly chatty, even when there are long lines. I don't think this should be the place for tourists to get travel info. I appreciate friendly, polite attendants, but several are way too chatty when there are line ups.											
Seattle	24%	Anacortes - Not impressed with customer service. Staff is not friendly. Why do you have a second booth after I have paid to tell me what lane to get into? Is the Union driving this staffing? Totally a waste of tax payer money during the winter months.											
Bainbridge	10%	Bremerton - There are multiple booths but I only ever see one in use. There's always a backup and a worry they won't get through everyone in time.											
Edmonds	8%	Clinton - Wish we could have a single lane. Very aggravating to get in a lane where someone doesn't have the money, can't find their credit card, talks too much with the ticket taker while the other lane has processed 5 cars and you end up missing the boat.											
Anacortes	6%	Fauntleroy - WSF staff waves cars along without signage or ?- you don't know what they want you to do and they act frustrated if you don't know what their waving arms mean.											
		Fauntleroy - WSF require that all cars have their ticketed manually validated (checked) before boarding. WSF does NOT at Fauntleroy accommodate this action to take place for one full ferry load, causing traffic at booth to stand still and severe backup.											
		Fauntleroy - Everyone has to stop at the toll booth even if they already have a ticket. The agents don't just swipe the ticket; they also give you a receipt. It just isn't necessary and takes time.											
		Fauntleroy - Drivers with prepaid tickets or passes are processed through the same booth as drivers without tickets. This creates a bottleneck at the booth and often, boats sail only partially full with a long line of cars up Fauntleroy Way.											

Attribute Key Code - 12
Overall Gap Analysis:
High Priority Area

Loads Ferries to Capacity



Dissatisfaction is highest for Fauntleroy/Vashon (27%) and Fauntleroy/Southworth (15%). Southworth/Vashon (50%) received the highest negative score. Fauntleroy terminal is cited most often.*

Ratings on a 5 point scale (1=low, 5=high)		TOTAL	SEA/ BAIN	SEA/ BRE	PTD/ TAH	EDM/ KIN	FAU/ VAS	FAU/ SOU	SOU/ VAS	PTT/ COU	MUK/ CLI	ANA/ SJI	INTER SJI
Respondents		3189	524	174	80	351	257	127	18	127	517	954	60
WSF loads ferries to capacity with little room between vehicles	Imp. (4-5)	90%	89%	81%	90%	89%	97%	91%	79%	90%	94%	85%	72%
	Sat. (4-5)	73%	76%	81%	61%	82%	50%	66%	33%	91%	74%	72%	63%
	Dissat. (1-2)	10%	7%	4%	22%	6%	27%	15%	50%	5%	7%	8%	16%
2017	Dissat.	10%	11%	8%	15%	4%	22%	14%	45%	4%	10%	9%	8%
Change	Dissat.	-	-4	-4	+7	+2	+5	+1	+5	+1	-3	-1	+8

**Among those routes that have a substantial number of respondents.*

Top 5 Unsatisfactory Terminals		Example of Verbatim Complaints – (complete sorted verbatims in separate document)											
Fauntleroy	45%	All-of-them - I think a ferry crew member should guide drivers to pull forward tight against the vehicle in front of them. This only occasionally happens, usually there is no guidance and drivers leave too much space between vehicles.											
Seattle	22%	Edmonds - Deck hands used to guide each car up tight to the car in front of them, lately they let people stop on their own leaving lots of room. I walked the main deck one day and they could have gotten at least 2 more cars in each row if they parked efficiently.											
Mukilteo	13%	Fauntleroy - Boats regularly leave half empty when the dock is full but the booths aren't processing vehicles fast enough.											
Bainbridge	13%	Fauntleroy - It is extremely infuriating to see a boat get underway that is less than full when there are multiple cars still on the dock. In my opinion insisting that the WSF adhere to 'on time' metrics at the expense of 'moving people and vehicles' metrics is wrong.											
Edmonds	11%	Friday Harbor - Can not get out of our large pickup unless we now tell them we will not park too close to the wall and we have to be able to get out on both sides. They are usually rude when we tell them no we will not park right up against the wall.											
Attribute Key Code - 15 Overall Gap Analysis: Nice To have Area		Lopez, Anacortes - If there is less room between cars and all available legal space is utilized, fewer cars would be left behind. Some loaders are VERY good. Some are not good at all.											
		Seattle - Noted that when tourists (cars with out of state plates) were loading, deck workers were not directing them in parking, or parking closely to other vehicles-and this was during winter season, not spring or summer peak times.											
		Seattle - Seems they are under pressure just to get the cars on as quickly as possible so the boat can leave											

Vehicle Loading Crews Provide Clear Directions



Dissatisfaction continues to be highest for Fauntleroy/Vashon (21%) followed by Mukilteo/Clinton (15%), Anacortes/San Juan Islands (15%) and Fauntleroy/Southworth (13%). Seattle, Fauntleroy, and Mukilteo are the most cited terminals.*

Ratings on a 5 point scale (1=low, 5=high)		TOTAL	SEA/ BAIN	SEA/ BRE	PTD/ TAH	EDM/ KIN	FAU/ VAS	FAU/ SOU	SOU/ VAS	PTT/ COU	MUK/ CLI	ANA/ SJI	INTER SJI
Respondents		3189	524	174	80	351	257	127	18	127	517	954	60
WSF vehicle loading crews provide clear directions / hand signals	Imp. (4-5)	95%	95%	90%	96%	95%	97%	95%	97%	98%	96%	95%	92%
	Sat. (4-5)	64%	72%	72%	41%	71%	50%	53%	47%	80%	59%	62%	48%
	Dissat. (1-2)	13%	12%	5%	24%	9%	21%	13%	17%	5%	15%	15%	23%
2017	Dissat.	13%	10%	9%	14%	7%	22%	17%	12%	11%	16%	15%	8%
Change	Dissat.	-	+2	-4	+10	+2	-1	-4	+5	-6	-1	-	+15

**Among those routes that have a substantial number of respondents.*

Top 5 Unsatisfactory Terminals	
Seattle	25%
Fauntleroy	24%
Bainbridge	17%
Mukilteo	17%
Clinton	16%

Attribute Key Code - 16
Overall Gap Analysis:
Opportunity Area

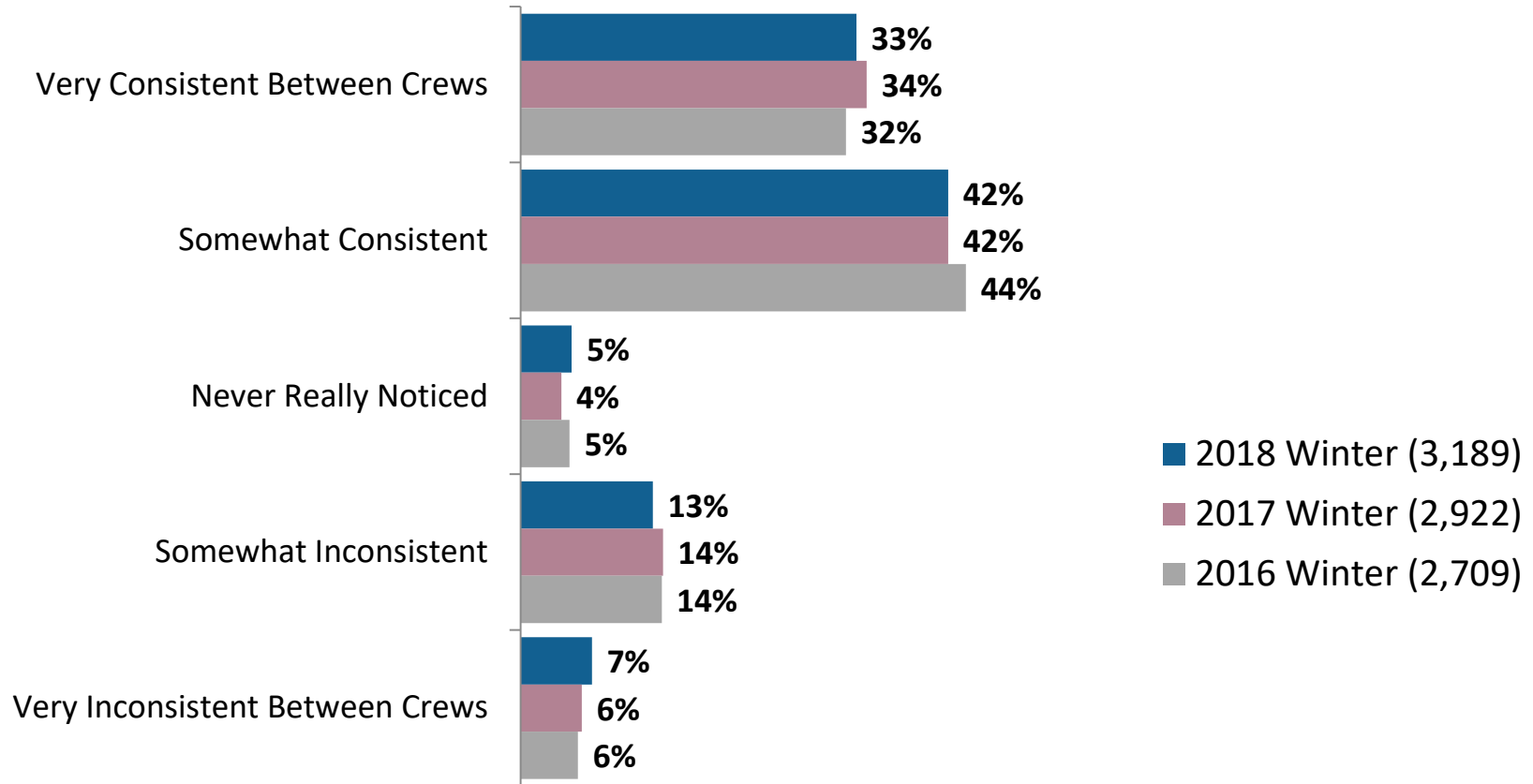
Example of Verbatim Complaints – (complete sorted verbatims in separate document)	
Anacortes	- crew needs to look at the car they are directing so we know who they are directing.
Anacortes	- You really have to watch because they will signal one way then change their minds and have you go another
Anacortes	- Yelling at vehicles with closed windows surrounded by running engines is ineffective. Clear, unambiguous hand signals should be used.
Bainbridge	- On many occasions, the traffic director is not paying direct attention to the loading vehicles. Sometimes, the loader delays a vehicle, causing the driver to miss the sailing when room existed on the vessel.
Bainbridge	- Not all were wearing orange or yellow gloves. Very distracting to drive on the ferry. Drive into a dark ferry from daylight. Hard to see hand directions if bright gloves not being worn. Or, lighted arrows.
Coupeville, Port Townsend	- For some reason, the deck loading crew on this run seem to be 'bossy' and 'short tempered' yelling at drivers after confusing them using erratic hand signals and often where more than one person is directing.
Fauntleroy	- When the sun is right in the eyes of the driver, the workers can't figure out their little gestures are not visible.
Fauntleroy	- We sometimes don't know what they want. They get really mad when we guess wrong including hitting the car.
Friday Harbor, Anacortes	- Hand signals not clear and ferry worker giving the signals acting angry with driver when the driver couldn't figure out his signals.
Mukilteo, Clinton	- The new gloves with red palms help BUT they do not have consistent signals which is very poor training. They are impatient and they yell at you.

Consistent Hand Signals/Directions



Most riders (75%) continue to say the loading/unloading crews hand signals/directions are consistent across crews. About one in five (20%) over the last three years continue to say they are not consistent.

Consistency of Hand Signals Asked Of Vehicle Drivers Only



Q97. (ASKED OF VEHICLE DRIVERS ONLY) How would you rate the consistency of the vehicle loading/unloading hand signals/directions you get from the different ferry/dock crews?

Ferries Bathrooms are Clean/Maintained



Dissatisfaction is highest for Seattle/Bremerton (12%) and Edmond/Kingston (10%) routes. The Walla Walla is cited most often.

Ratings on a 5 point scale (1=low, 5=high)		TOTAL	SEA/ BAIN	SEA/ BRE	PTD/ TAH	EDM/ KIN	FAU/ VAS	FAU/ SOU	SOU/ VAS	PTT/ COU	MUK/ CLI	ANA/ SJI	INTER SJI
Respondents		3305	606	230	70	351	249	132	20	129	483	975	60
The bathrooms on the ferries are clean and well maintained	Imp. (4-5)	98%	98%	98%	94%	98%	97%	94%	98%	99%	98%	97%	91%
	Sat. (4-5)	73%	70%	53%	93%	74%	83%	74%	72%	87%	79%	74%	68%
	Dissat. (1-2)	8%	9%	12%	4%	10%	4%	5%	7%	3%	5%	8%	5%
2017	Dissat.	7%	9%	16%	1%	7%	3%	4%	0%	2%	4%	7%	5%
Change	Dissat.	+1	-	-4	+3	+3	+1	+1	+7	+1	+1	+1	-

**Among those routes that have a substantial number of respondents.*

Top 5 Unsatisfactory Vessels		Example of Verbatim Complaints – (complete sorted verbatims in separate document)											
Puyallup	35%	Cathlamet - The accessible stall in the ladies head has been out for months, I'm close to filing a complaint with the state regarding the ADA. Also, very tired of crew locking half of the stalls so they can't be used and won't need to be cleaned.											
Wenatchee	33%	Chelan, Hyak, Elwha - There are usually a couple stalls that are out of service. Ferry stopped supplying tissue toilet seat covers and it just looks dirty.											
Tacoma	29%	Chelan, Yakima - The bathroom stalls have dirty walls.											
Walla Walla	25%	Chetzemoka - Bathroom always smells.											
Spokane	22%	Chimacum - Bathroom stalls are marked with yellow caution tape - been this way for months											
		Chimacum - where to begin.... Chimacum's men's restroom was filthy, one of the faucets didn't work, and there was no t.p. in the first stall I tried.											
		Elwha - Urine on floor, no paper towels.											
		Elwha, Samish - They smell like piss and at least one stall is always marked out of order											
		Elwha, Yakima - Floors not clean. Lots of water around sinks, need better design and towels nearer. Locks loose or out of alignment, so go open while occupied. And some toilets flush while you are still on. What is a child supposed to do about reaching tissue?											
		Hyak, Elwha, Yakima - The boats on the San Juan run have dirty women's bathrooms. Floor is mopped but never clean. Corner filthy. Even worse on a busy weekend.											

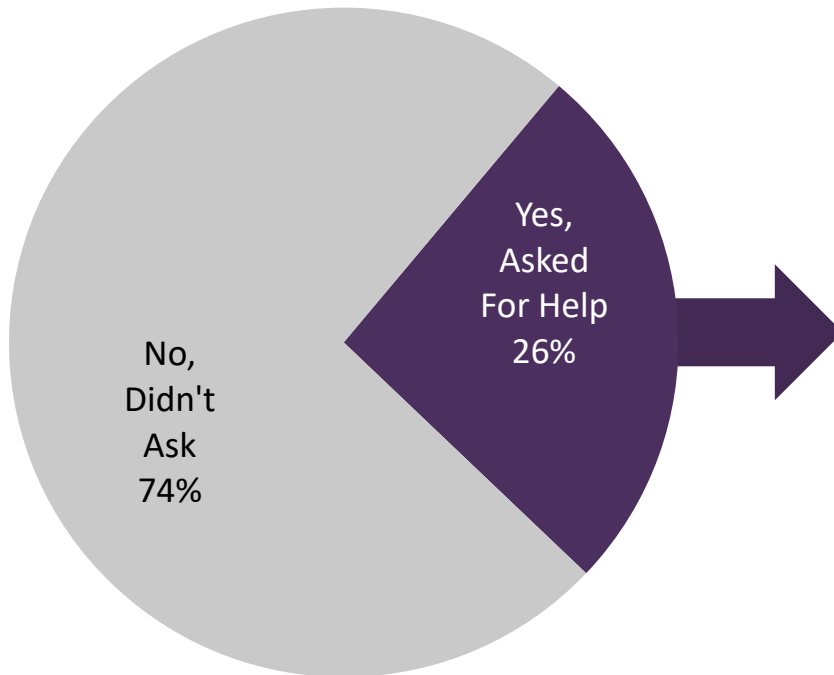
Attribute Key Code - 21
Overall Gap Analysis:
High Priority Area

Help/Assistance From Vessel Staff

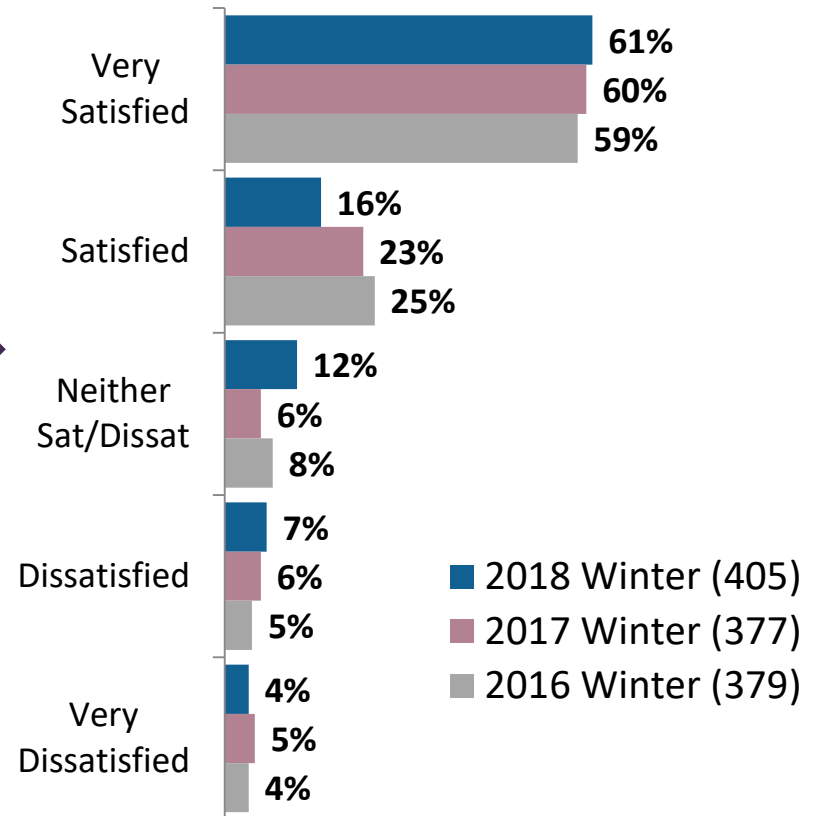


About one-in-four riders have asked the vessel staff for help (26%) and most (77%) were satisfied with the assistance they received. About one in ten (11%) continue to not be satisfied with the vessel staff help/assistance.

Asked WSF Vessel Staff For Help/Assistance



Satisfaction With WSF Vessel Staff Help/Assistance



Q103. Did you specifically ask a WSF vessel staff member for help/assistance during the Winter period (January 7th through March 31st 2018)?

Q104. How satisfied were you with the help/assistance the WSF vessel staff member gave you?

On Time Departures



Dissatisfaction is highest for Fauntleroy/Vashon (24%), Seattle/Bremerton (17%) and Fauntleroy/Southworth (14%) routes. On-time departure dissatisfaction increased the most on the Seattle/Bremerton route over 2017).*

Ratings on a 5 point scale (1=low, 5=high)		TOTAL	SEA/ BAIN	SEA/ BRE	PTD/ TAH	EDM/ KIN	FAU/ VAS	FAU/ SOU	SOU/ VAS	PTT/ COU	MUK/ CLI	ANA/ SJI	INTER SJI
Respondents		3627	641	250	88	383	273	142	22	146	566	1053	63
WSF has on-time/dependable departures	Imp. (4-5)	97%	98%	98%	96%	97%	87%	97%	89%	99%	96%	98%	100%
	Sat. (4-5)	74%	77%	68%	60%	88%	40%	64%	53%	91%	81%	72%	81%
	Dissat. (1-2)	9%	6%	17%	14%	4%	24%	14%	19%	1%	7%	9%	2%
2017	Dissat.	8%	7%	4%	21%	3%	24%	13%	0%	4%	7%	10%	4%
Change	Dissat.	+1	-1	+13	-7	+1	-	+1	+19	-3	-	-1	-2

**Among those routes that have a substantial number of respondents.*

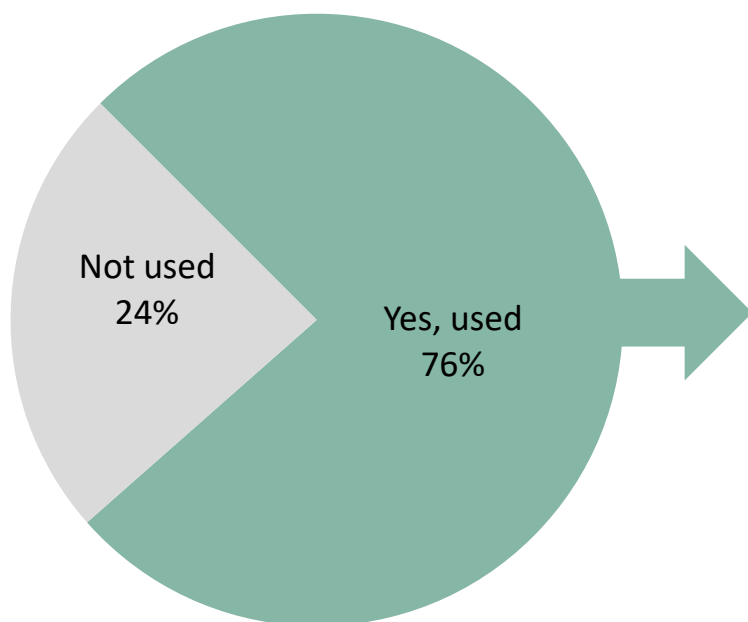
Top 5 Unsatisfactory Routes		Example of Verbatim Complaints (complete sorted verbatims in separate document)	
FAU/VASHON	30%	Seattle/Bainbridge - Better traffic coordination with City of Seattle. We've been on the island nearly 40 years and the situation is getting worse, not better.	
SEA/BAINBRIDGE	22%	Seattle/Bainbridge - Get back on schedule faster. If the boat is delayed leaving speed up so we arrive at the same time and the issue doesn't compound.	
SEA/BREMERTON	21%	Seattle/Bremerton - Boats are probably late 50% of the time. Late announcements. No accountability: no reason given, no apology. Sometimes boats sit at the dock and NOTHING is happening, yet it leaves late.	
MUK/CLINTON	12%	Seattle/Bremerton - Ferry delays are a very common occurrence, most often due to staffing issues or repairs needed on the vessels. Managing staffing and having appropriate back up plans will assist with on time departures from Bremerton.	
ANA/SAN JAUN	8%	Point Defiance/Tahlequah - Figure out the problem of loading cars at the Fauntleroy ferry terminal.	
		Edmonds/Kingston - The issue at the dock has gone on way too long. 1) Keep a police person on the site at all times, 2) allow those with permanent passes to by pass (go around) the ticket booth and be scanned on the other side quickly and efficiently.	
		Fauntleroy/Vashon - better loading/unloading and ticket purchase procedures, better procedure in place for late or missing crew.	
		Fauntleroy/Vashon - cancelled ferry due to not enough crew or not enough qualified crew. Really. What if your hospital operated like the ferry. Missing my flight because I can't depend on the ferry system to keep boats in good mechanical order and employees on time is wrong.	

Using WSF Website

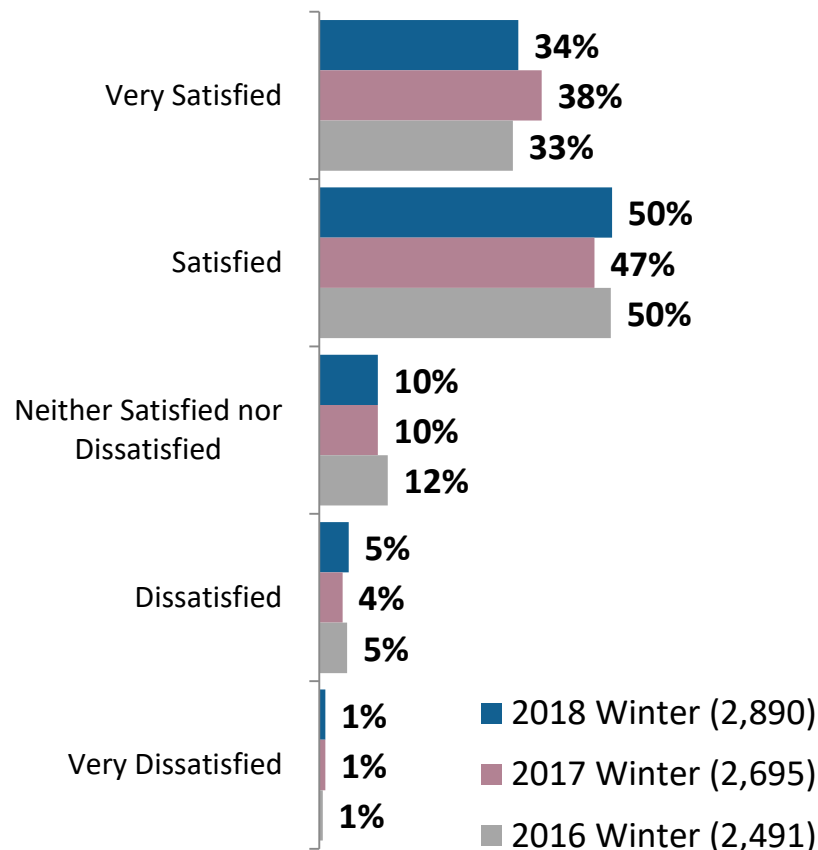


Three-fourths of riders (76%) have used the WSF website and most (84%) continue to say they are satisfied with their experience while 6% say they are dissatisfied.

Used WSF Website



Experience Using Website



Q90. During the Winter Schedule period (January 7th through March 31st 2018), have you for any reason used the WSF website?

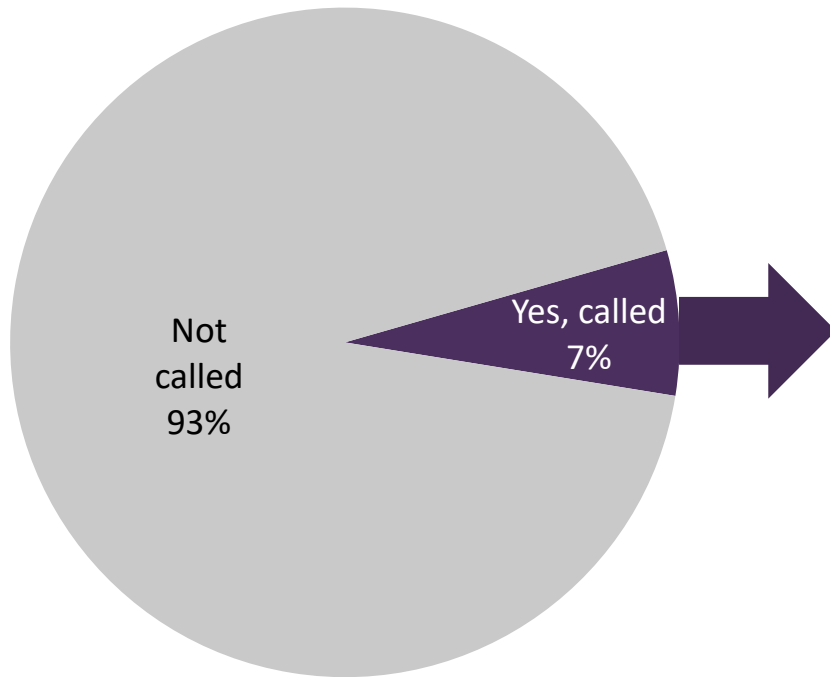
Q91. How satisfied were you with your experience using the WSF website?

Calling WSF Customer Service by Phone

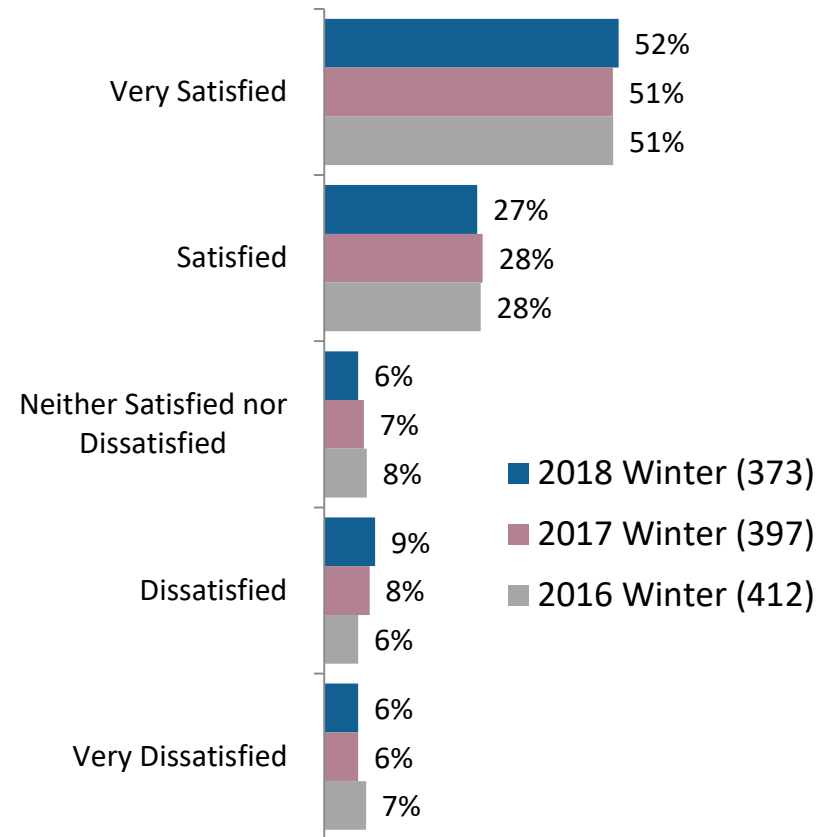


Only one-in-ten (7%) riders have contacted WSF customer service by phone and most (79%) are satisfied and 15% are dissatisfied with their experience.

Called WSF Customer Service



Experience Calling WSF



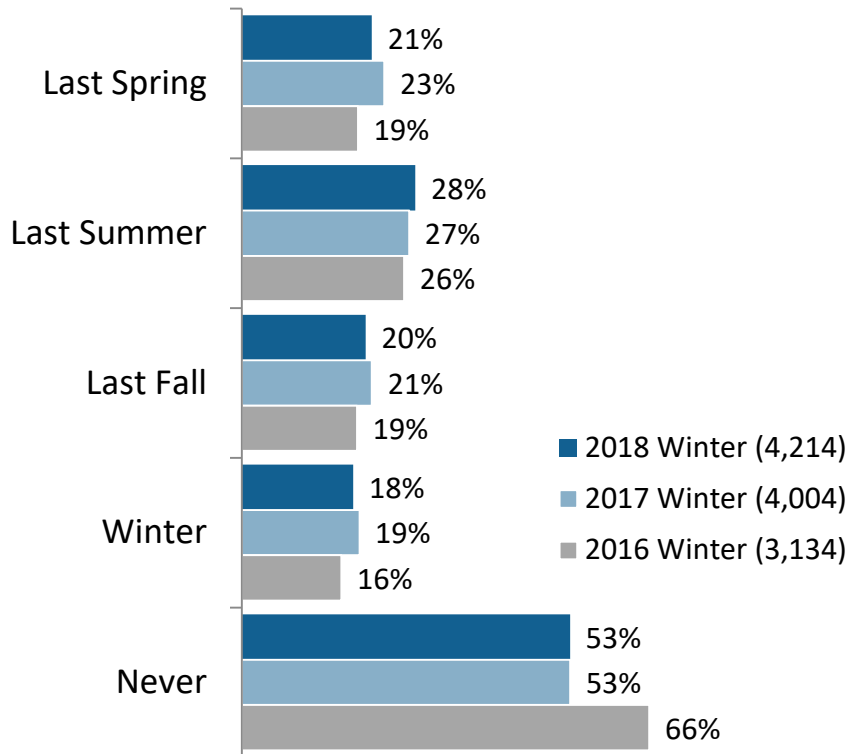
Q93. During the Winter Schedule period (January 7th through March 31st 2018), have you for any reason called WSF Customer Service by phone?
Q94. How satisfied were you with your experience calling the WSF by phone?

Using WSF Reservation System

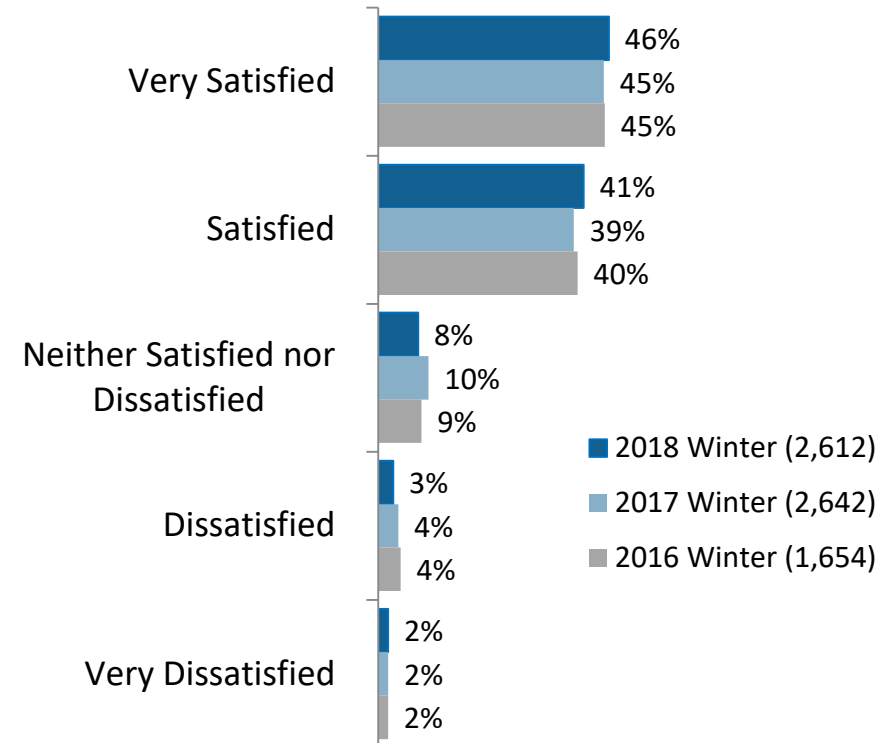


Among the 47% of riders who used WSF reservation system, the vast majority (87%) say that they are satisfied with their experience. Only 5% of those that use the system are dissatisfied with it.

**Used WSF Reservation System
(Multiple Response)**



Experience with the WSF reservation system



Q113. Have you used WSF reservation system during ... (Circle all that apply)

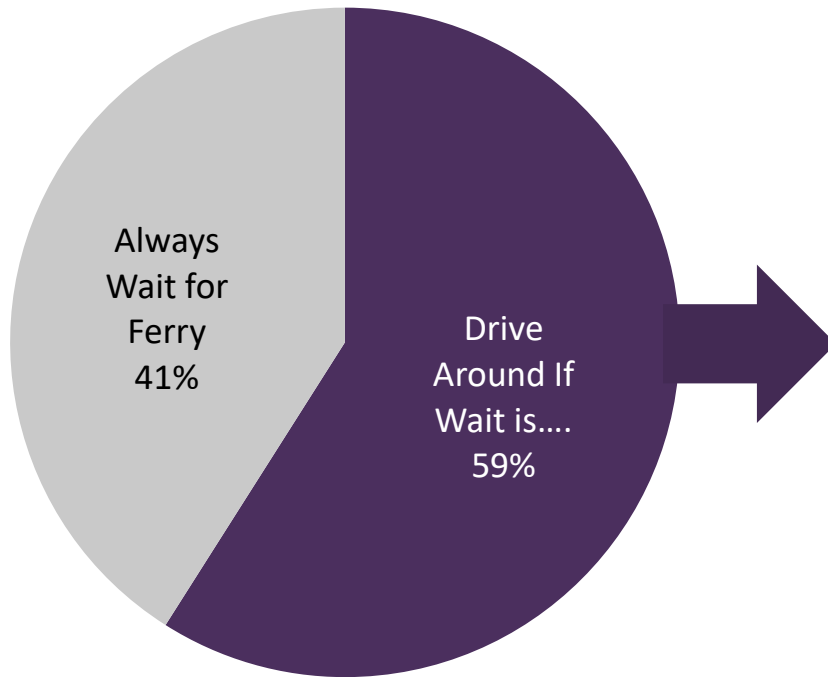
Q114. How satisfied were you with your experience with WSF reservation system?

Southworth to Eastside Drive Around

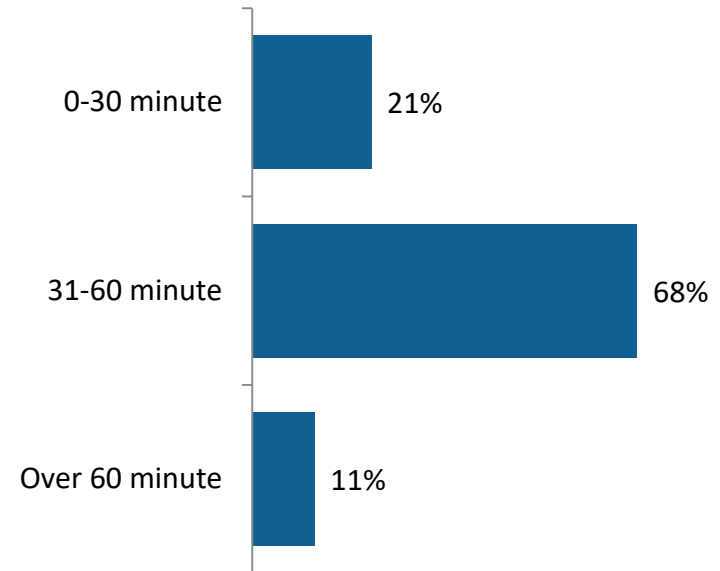


Six-in-ten (59%) Southworth to Fauntleroy riders have driven around to the eastside of Puget Sound if the wait for a ferry is over a certain time. The average time is 50 minutes with the majority doing so if the wait is 60 minutes (89%).

**Wait Or Drive Around From Fauntleroy
(n=299 Fauntleroy/Southworth Drivers)**



Minute Wait Before Driving Around



**Average Wait Before Driving
50 Minutes**

Q120. How long have you waited for a ferry, if ever, before driving around from Southworth to the eastside of Puget Sound?
Q120A. Minutes waited before driving around from Southworth to eastside of Puget Sound:

Methodology – Freight Shippers Study



- ▶ Telephone survey of WSF freight shippers drawn from WSF commercial business account holders
- ▶ **May 14th – June 1st, 2018**
- ▶ **100 total interviews; see appendix for list of companies; 24 companies also did the survey in 2016 (5 of those also in 2014)**
- ▶ Respondents were screened to meet the following criteria:
 - Be the person **responsible for scheduling** freight trips on ferries for the trucks in their fleet
 - Use WSF to transport goods and services by truck
- ▶ Interviewing conducted by trained, professional interviewers

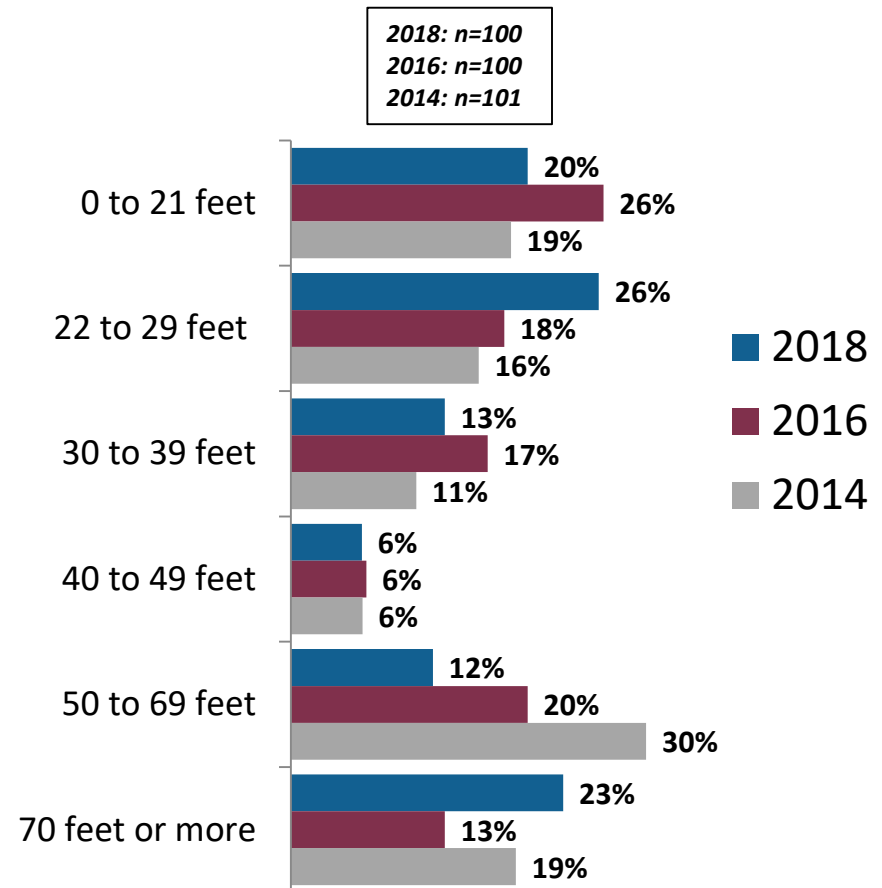
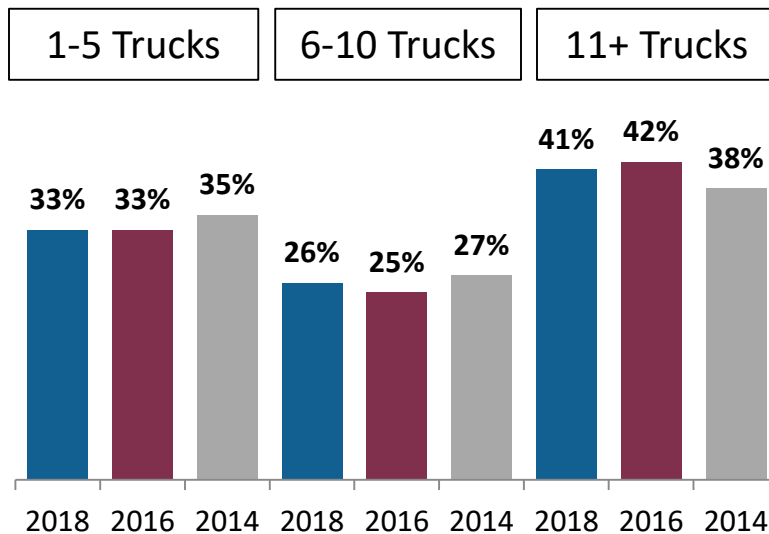
Please note that due to rounding, some percentages may not add up to exactly 100%.

Fleet Profile – Comparison



Fleet sizes and make up for the freight companies interviewed in the 2018 survey are similar to the 2016 and 2014 survey. The percent of freight companies' fleets using WSF has also remained constant at about 50% since 2014.

2018: n=100, 47% of fleet use WSF
2016: n=109, 52% of fleet use WSF
2014: n=104, 54% of fleet use WSF



Q2. Approximately how many trucks are in your fleet in total? An estimate is fine.

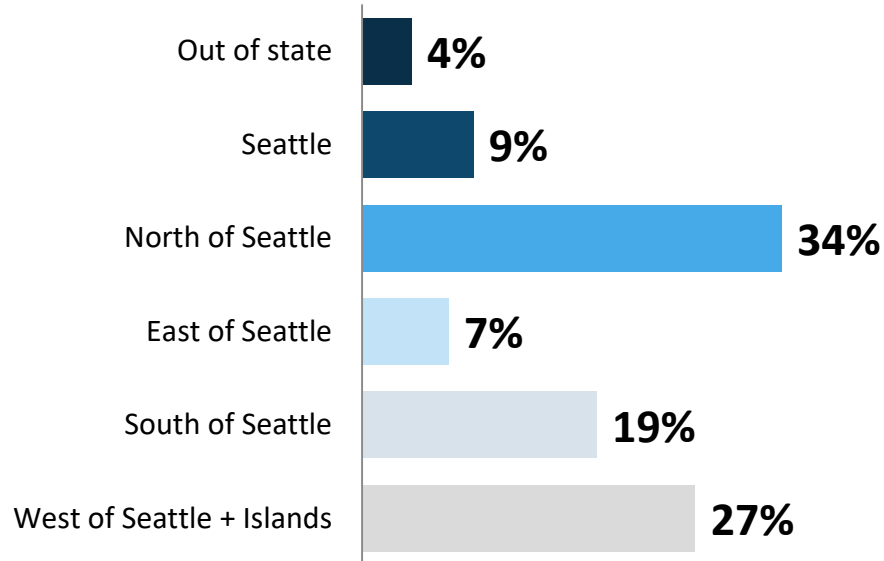
Q7a-f. Thinking only of those trucks using Washington State Ferries, how many are in each of the following size categories? [IF NEEDED CLARIFY: Truck length is the total length of the truck and trailer]

Fleet Profile – Fleet Zip Code



This new question asked in 2018 found that the freight companies interviewed from WSF commercial account list had their trucks based in areas either north (34%), west (27%) or south (19%) of Seattle.

General Zip Code Where Majority of Trucks Are Based - 2018 (n=97)



Q8. In what zip code is the majority of your fleet based?

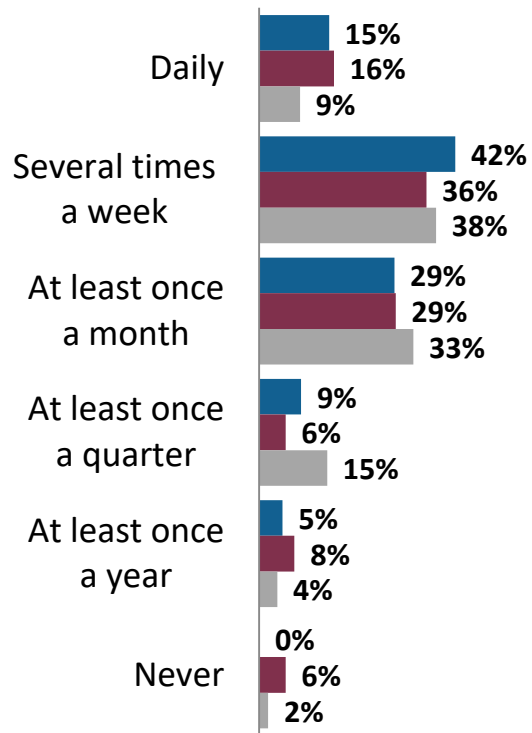
Ferry Usage – Comparison



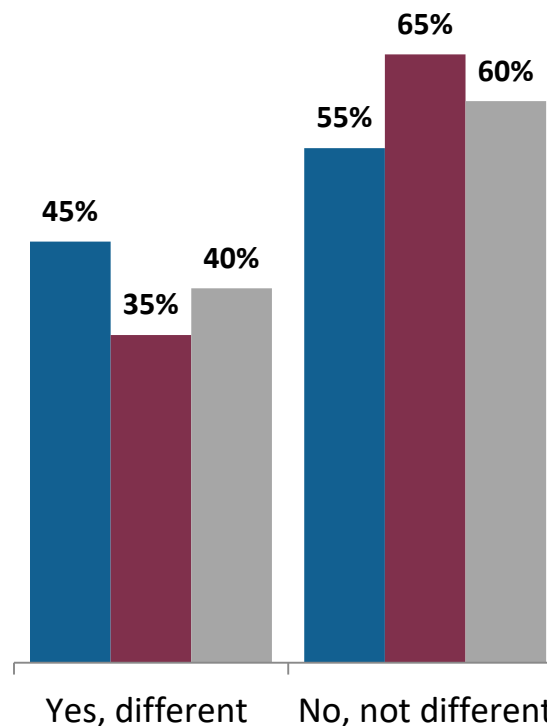
Frequency of ferry trips over the year, average number of one-way trips per month, and seasonal truck crossings are all similar in 2018 to 2016/2014 given study sample size.

■ 2018 ■ 2016 ■ 2014

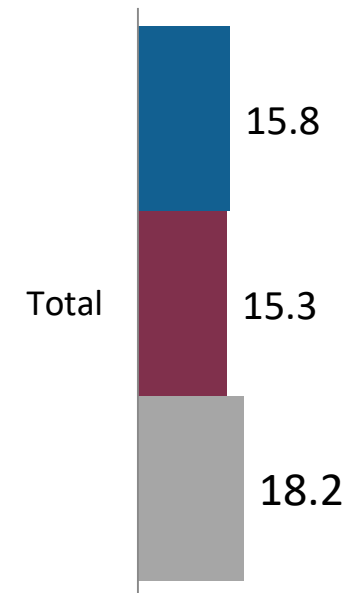
Frequency of Ferry Trips



Truck Crossing – Seasonal Difference



Average Number of One-Way Trips Per Month



Q4. How frequently do you use the Washington State Ferry system to transport goods and services by truck?

Q5. Is the average number of ferry crossings made by your trucks different October through March than April through September?

Q6/Q7/Q8. And, approximately how many one-way crossings are made by your trucks in a typical month from October through March, April through September, and in a typical month? Please base your answer on a crossing being a one-way trip, so count a round trip as two crossings.

Routes Traveled – Comparison



More of the companies in 2018 reported using most often the Anacortes/San Juan and Fauntleroy/Vashon routes than in 2016 to the decline of the Seattle/Bainbridge route.

Route	Total Use		Most Used	
	2018	2016	2018	2016
Anacortes / San Juans Includes Shaw, Orcas, Lopez, and Friday Harbor	42%	33%	24%	10%
Edmonds / Kingston	36%	41%	25%	19%
Mukilteo / Clinton	35%	33%	18%	23%
Fauntleroy / Vashon	23%	15%	11%	2%
Seattle / Bainbridge	19%	28%	8%	15%
Coupeville / Port Townsend	17%	15%	5%	2%
Seattle / Bremerton	14%	12%	1%	4%
Point Defiance / Tahlequah	9%	8%	4%	2%
Vashon / Southworth	6%	10%	2%	2%
Fauntleroy / Southworth	4%	7%	--	--
Interisland San Juans Includes Shaw, Orcas, Lopez, and Friday Harbor	4%	7%	1%	--
Anacortes / Sidney	--	6%	--	--
Routes used equally	4%	--	5%	19%
Don't know/Refused	--	5%	--	2%

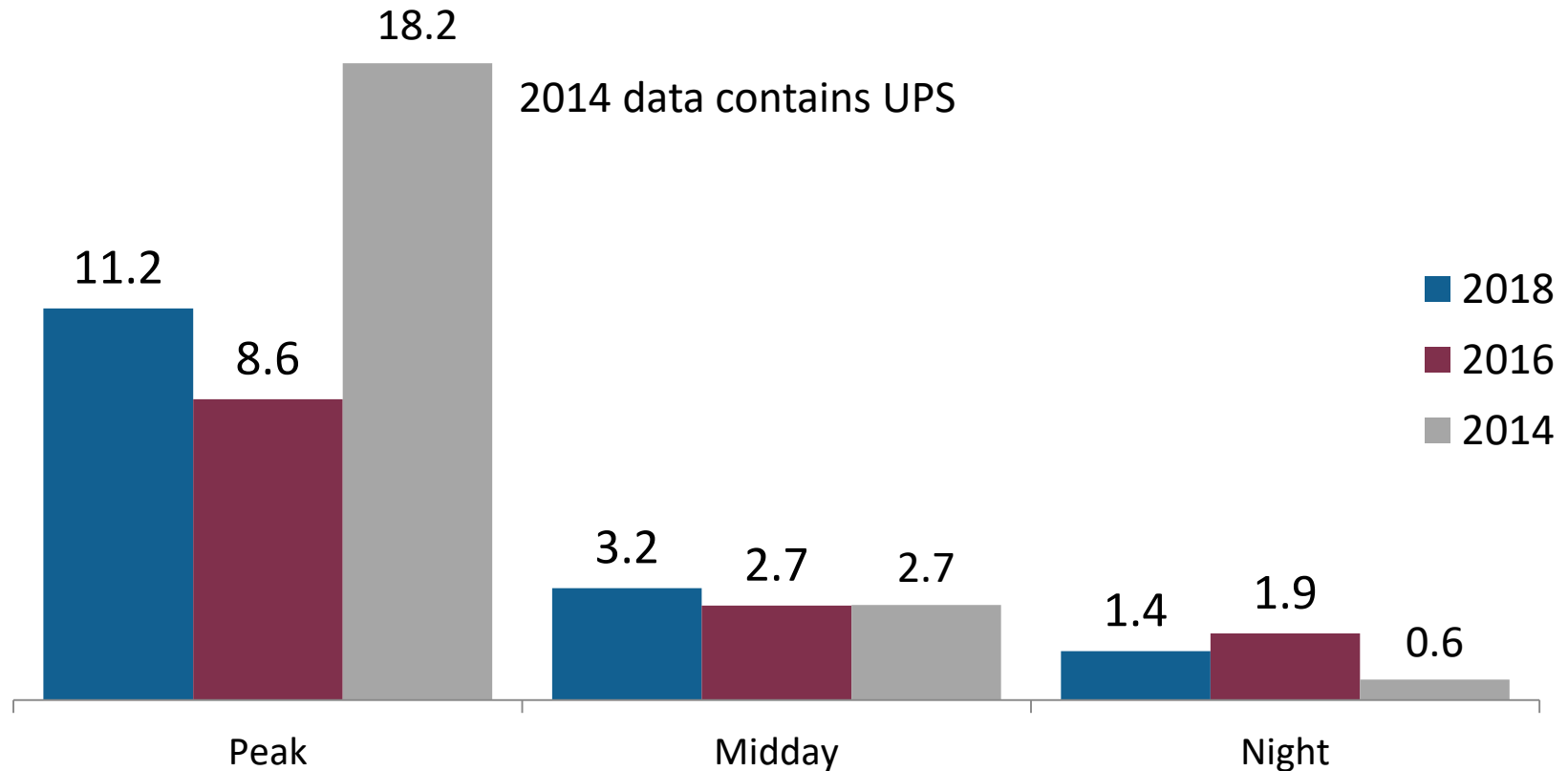
Q9. What ferry routes do you use for moving freight? [MULTI RESPONSE] [IF MORE THAN ONE ROUTE MENTIONED IN Q9 ASK FOLLOW-UP Q10]

Q10. And of those routes, which ferry route do you use most often? [ASK ONLY ROUTES MENTIONED IN Q9]

Travel Behavior – Detailed Comparison



The 2018 and 2016 trips per period are very similar.

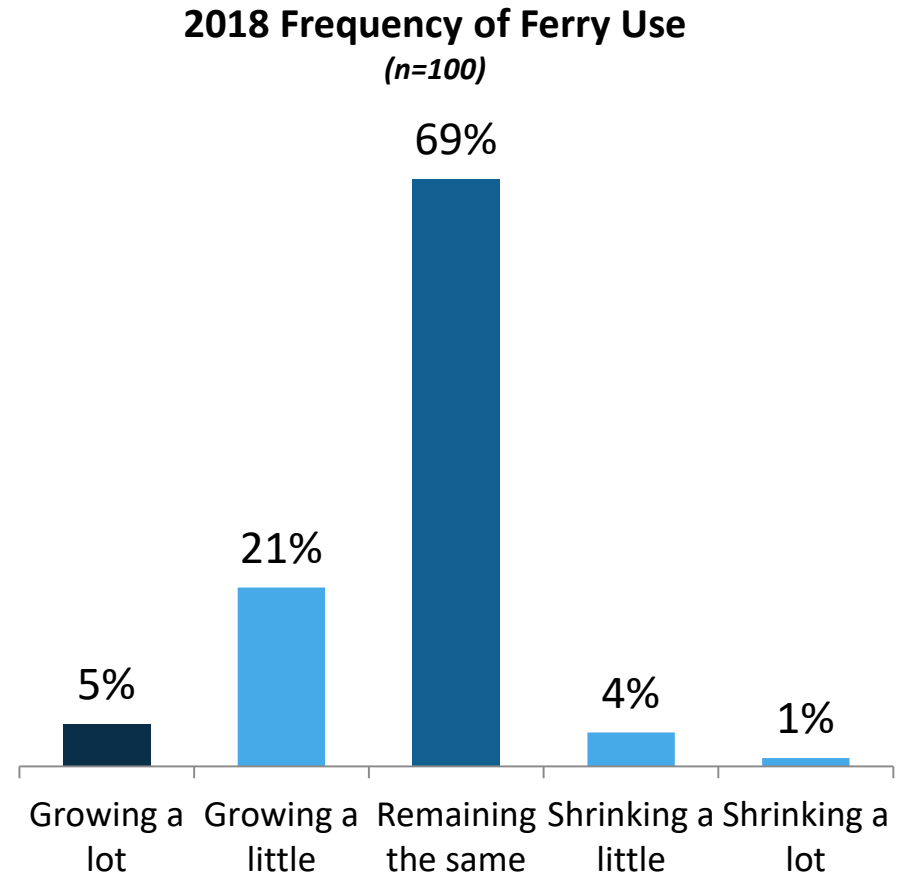
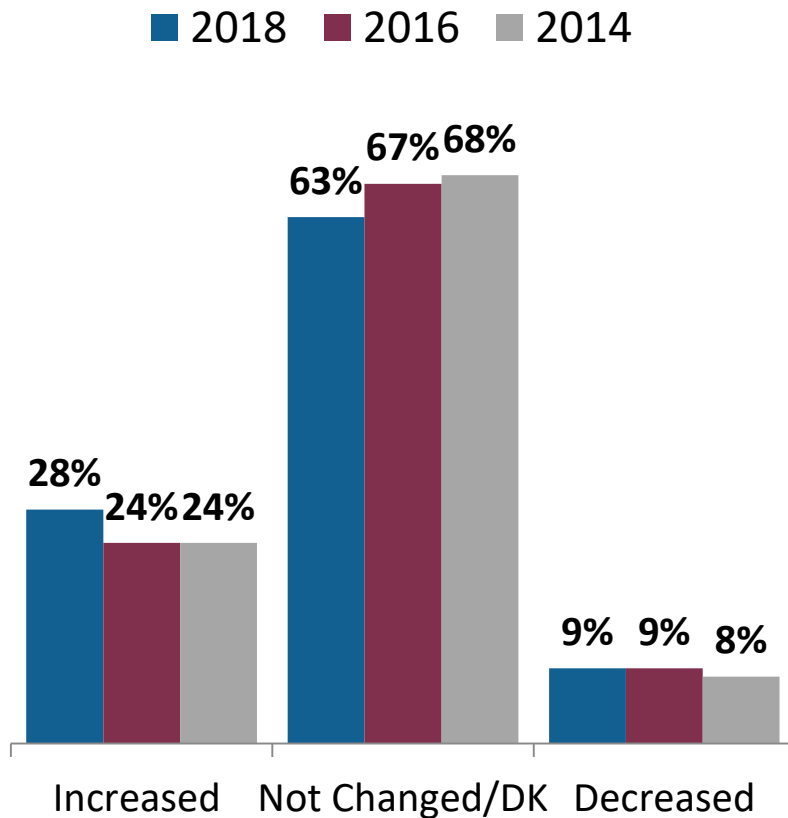


Q15a-c In a typical month, how many of your [INSERT NUMBER FROM Q3] freight trips are taken during [PEAK/MIDDAY/NIGHT]?

Travel Behavior – Comparison



Travel behavior has remained consistent from 2014/2016 to 2018.

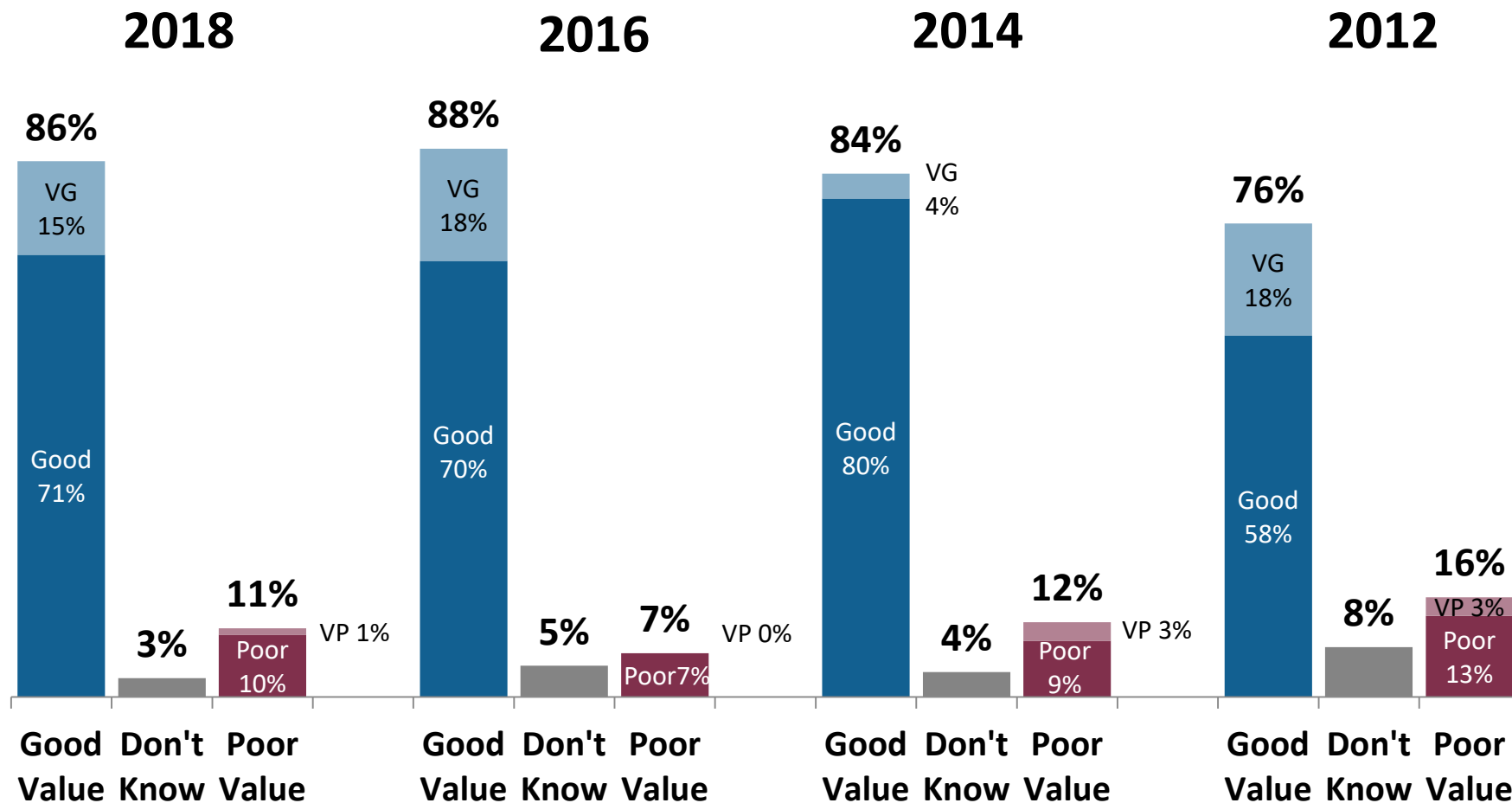


Q39. Since you or your company started using the ferries for transporting freight, has the frequency with which you transport freight via the ferries... ?
Q39b. What is the primary reason for the decrease?

Value Perception – Comparison



Overall, the perception of WSF as a good value remains the same between 2012/14/16 and 2018 at over eight out of ten (76% to 86%).



Q40. Considering your firm's experience with the ferries, which of the following phrases best describes the value to your company of using Washington State Ferries to move freight to your destination? "Value" means what you receive for the amount you pay. Are the Washington State Ferries... ?

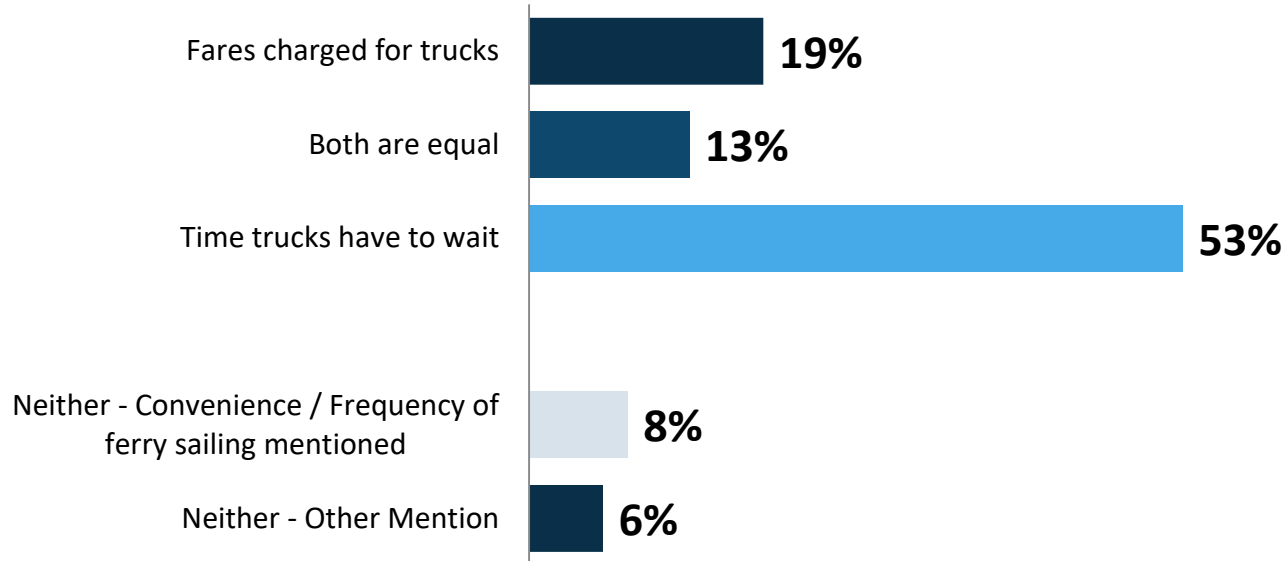
Travel Behavior – Fare vs. Waiting Impact



By a large margin, the time trucks have to wait (53%) has a much greater impact than the fares WSF charges for trucks (19%) on whether to use or not use WSF.

Fares vs. Waiting Time Impact on WSF Usage

(n=98)

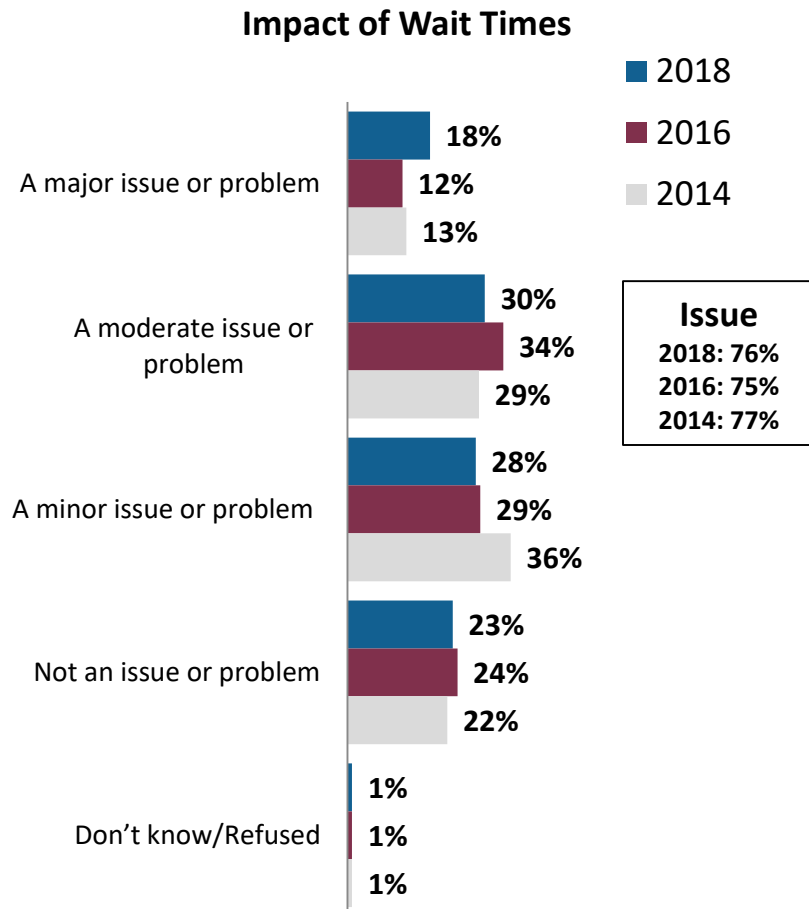


Q17. Which of the following has a greater impact on your decision to use or not use Washington State Ferries? The fares charged for your trucks or the time your trucks have to wait at the terminal?

Wait Times – Comparison



Similar to 2014/16, the issue of wait times impacts about three out of four companies in 2018. Per boat wait times are also similar on all the routes between 2016 and 2018.



Routes	% Experiencing long wait times		Avg no. of Boats to wait through	
	2018 n=71	2016 n=75	2018	2016
Anacortes / San Juans	28%	19%	1.6 [n=17]	1.9 [n=12]
Edmonds / Kingston	20%	16%	1.4 [n=11]	1.1 [n=10]
Mukilteo / Clinton	14%	13%	1.2 [n=8]	1.6 [n=9]
Fauntleroy / Vashon	10%	1%	1.4 [n=5]	1.0 [n=1]
Seattle / Bainbridge	8%	11%	1.3 [n=6]	1.0 [n=6]
Coupeville / Port Townsend	7%	4%	1.5 [n=4]	1.0 [n=3]
Point Defiance / Tahlequah	7%	--	1.2 [n=5]	--
Interisland San Juans	3%	3%	2.0 [n=2]	1.0 [n=2]
Seattle / Bremerton	1%	1%	1.0 [n=1]	1.0 [n=1]
Vashon / Southworth	1%	1%	1.0 [n=1]	--
All routes	--	3%	--	--
Don't know	5%	--	--	--

Q22. One problem commercial vehicle drivers have reported is how long they have to wait before they can drive on the ferry. Overall, how big of an issue or problem would you say wait times are for you or your drivers?

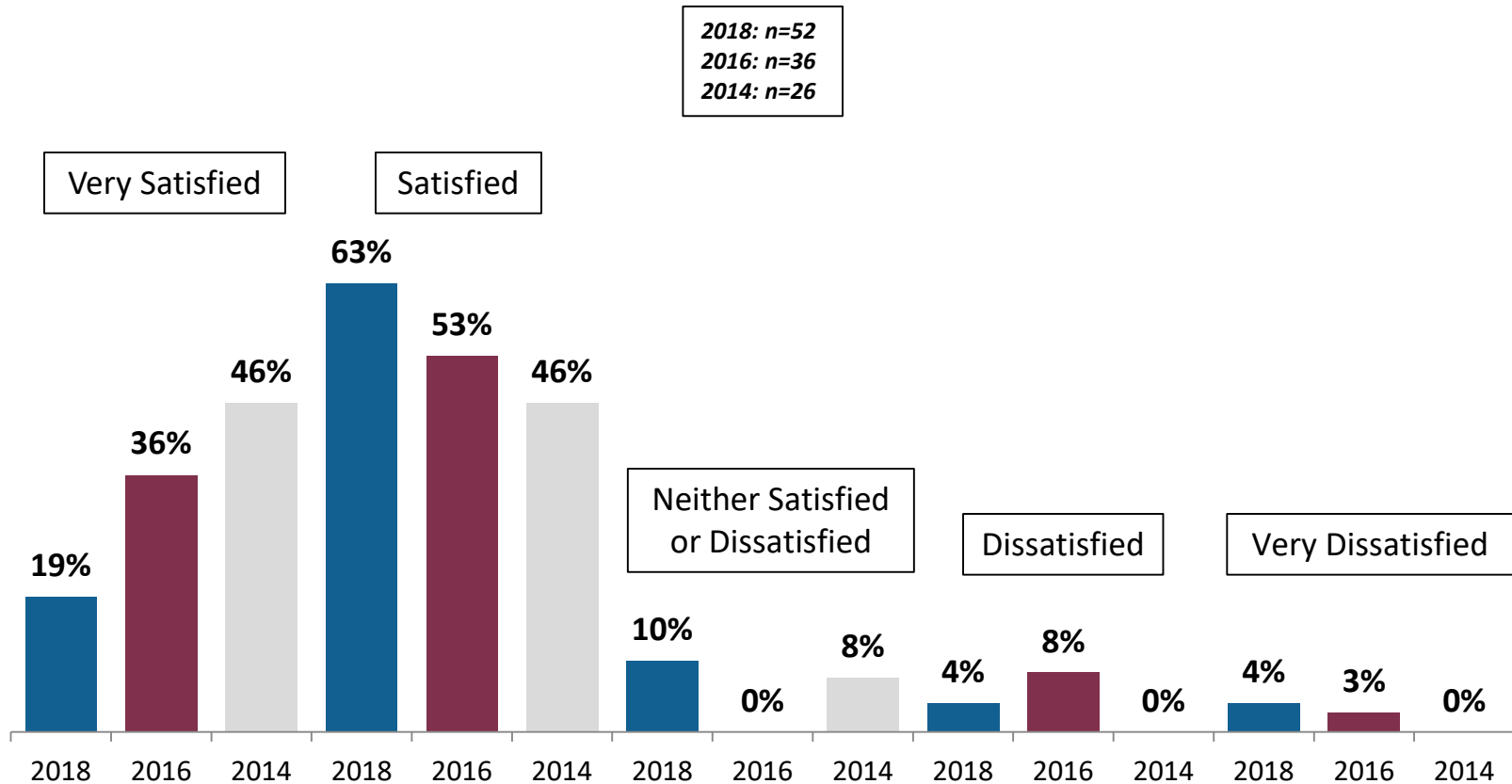
Q23. On what route or routes do your drivers experience excessively long wait times? **[MULTI RESPONSE]**

Q24. Currently, what is the average number of boats you or your drivers have to wait through? An estimate is fine.

Reservations – Satisfaction Comparison



Overall satisfaction in 2018 (82%) has decreased from 2016 (89%) and 2014 (92%), but the total number of companies using the system has also increased.



**This question changed in 2016 to omit the word "commercial" when describing the vehicle registration system.*

Q28. All things considered, how satisfied are you with the vehicle reservation system that WSF offers?

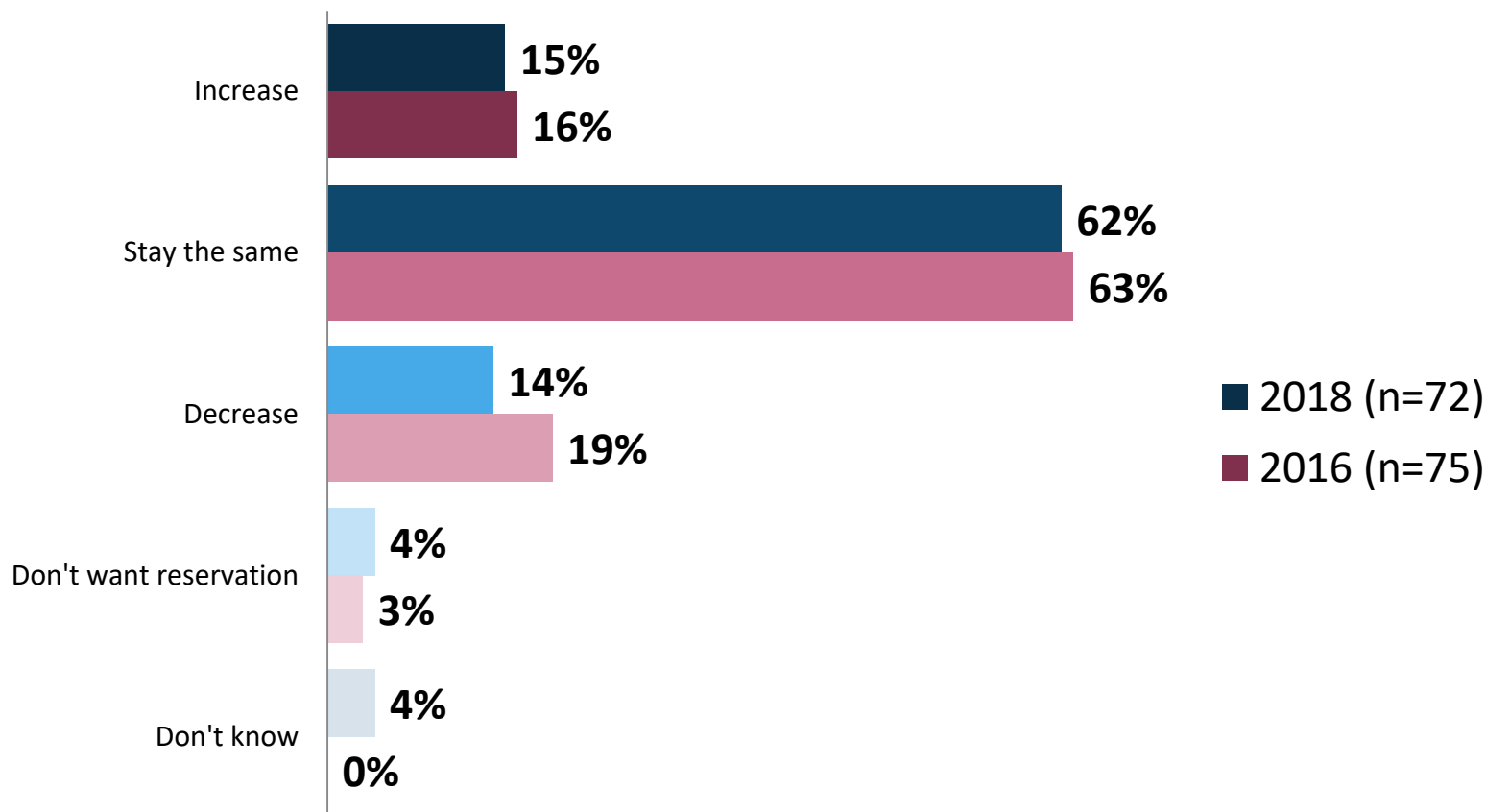
Reservations – Central Puget Sound



Of those customers who use Central Puget Sound ferry routes (n=72), two thirds (62%) would not change their ferry usage given a central sound reservation system, and only 15% would increase usage. This is similar to 2016.

Use WSF More w/ Reservation System - 2018

(n=72)



Q29. If all of the Central Puget Sound ferry routes had a reservation system, would your companies usage increase, decrease or remain the same?

Reservations – Central Sound Deposit Impact

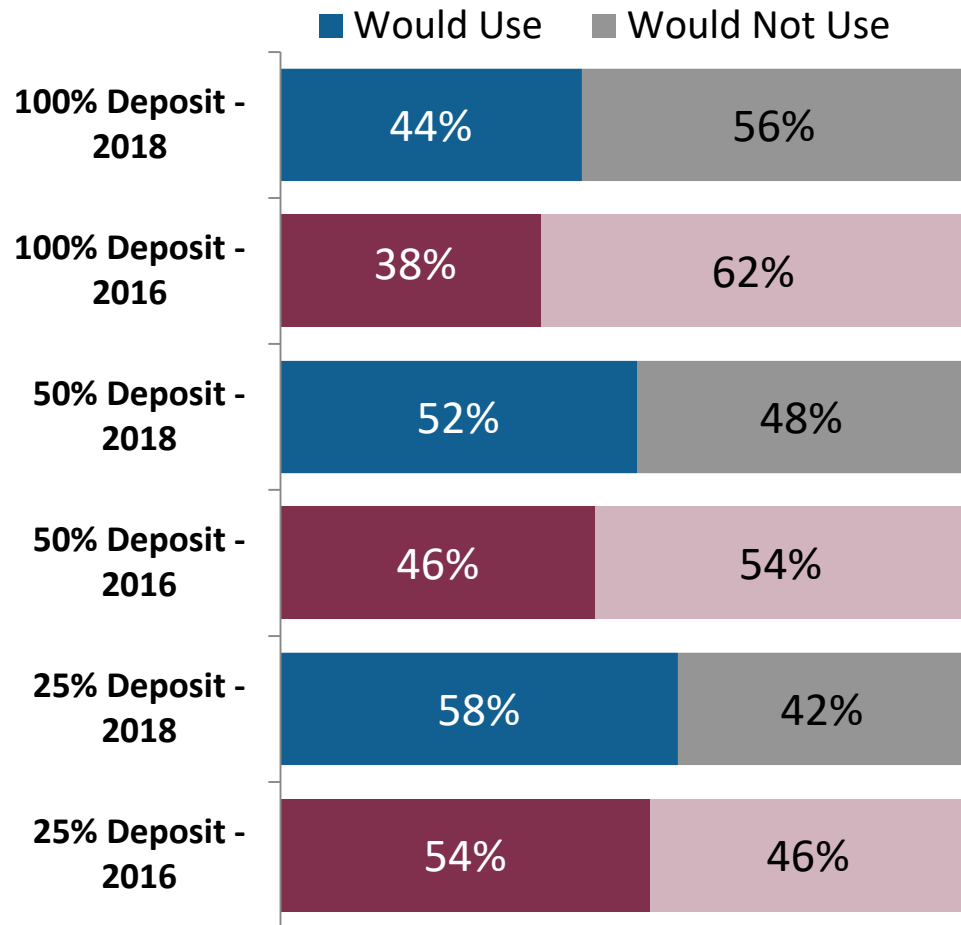


Of those who would be open to a vehicle reservation system for Central Puget Sound routes, about half say they would be likely to use the system as described with either a 50% or 25% deposit. Attitudes towards usage dependent on deposit level has not change between 2016 and 2018.

The current WSF vehicle reservation system has the following features:

- *Space is available for reservations up to two months ahead of the season schedule start date;*
- *No reservation deposit is necessary at the time the reservation is made;*
- *A reservation no-show fee equal to 25% to 100% of the applicable fare is charged if you miss your reserved sailing and don't travel from the same terminal on the same day;*
- *Reservations may be cancelled and/or changed once up to 5 pm of the prior day with no penalty;*
- *If a truck is not on time for boarding, space is released for general boarding and the company forfeits their reserved space but are not charged a no-show fee if they travel the same day; and*
- *The online reservation system will provide a 24 hour reminder on upcoming reservations along with travel tips to make your reservation experiences go smoothly.*

Q30-32. How likely would your company be to use this vehicle reservation system knowing you would pay XX% of the fare if your truck wasn't there on time for boarding? Would you say ... ?

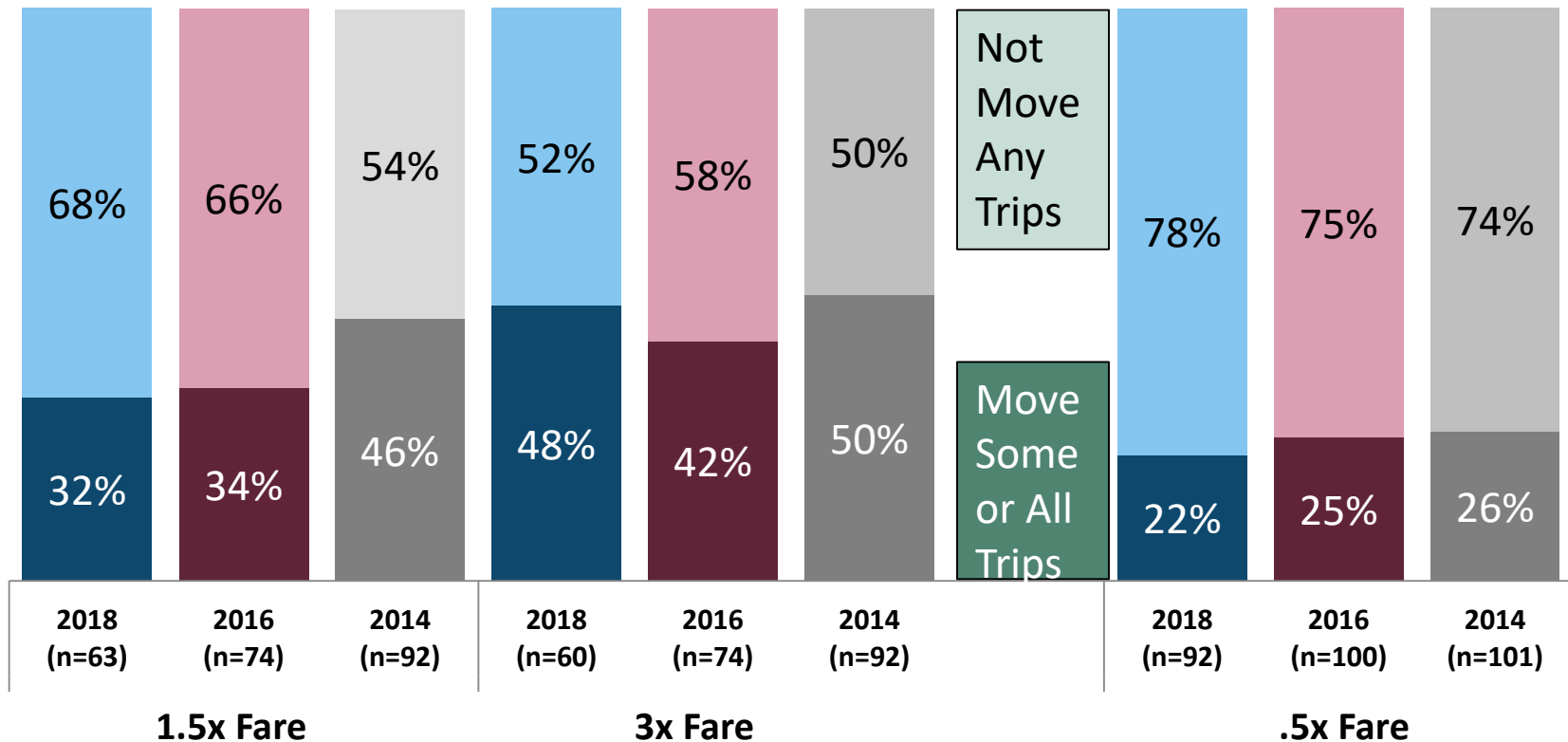


Congestion Pricing – Comparison



The likelihood of moving trips has remained the same between 2016 and 2018 at one third for 1.5x fare and half for 3x fare while one in four if fares were cut in half for night time trips.

Would Move Trips to Off Peak Times



Q34-35. If freight customers who use the ferry during peak travel periods were charged one and a half times/three times the fare currently charged for freight vehicles, what percent of your freight trips would you move to off-peak times? Q36. If freight customers on overnight sailings between 9pm and 5am each day were charged just half of the fare currently charged for freight vehicles, what percent of your freight trips would you schedule for the 9pm and 5am time period?

Methodology- General Public Study



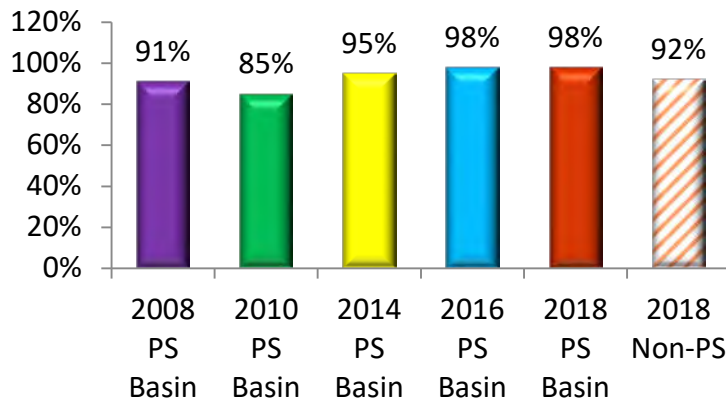
- ❖ The following report presents the findings from the general market assessment research. The main objectives of this research are to understand:
 - How are the ferries utilized by three distinct groups: Residents living in: 1) Eastside of Puget Sound, 2) Westside of Puget Sound and 3) Residents living in Non Puget Sound areas?
 - How has WSF utilization changed since the past 2008, 2010, 2014 and 2016 studies?
 - How important do residents think WSF is as a contributor to the overall economy and recreation/tourism in the Puget Sound region?
 - What are residents feelings towards who should pay for WSF operational and capital costs?
- ❖ The study was conducted between **June 1, 2018 and June 20, 2018 via the Voice of Washington State (VOWS) online panel. A total of 5,419 online interviews were conducted**
 - VOWS panel used since 2012 representing 28,000 Washington citizen concurred about transportation issues
 - VOWS defunded in 2017 but still intact however future use is unlikely given panel decay
- ❖ The data was weighted to be proportionate to the state population. See appendix B for details.
- ❖ Throughout the report these terms are used to define the following segments.
 - Statewide refers to the total sample
 - Puget Sound (PS) refers to the sample of counties boarding the Puget Sound
 - East side communities (PS-East) are: King, Snohomish, Skagit, Pierce, etc. on the east side of Puget Sound
 - West side communities (PS-West) are: Kitsap, Clallam, Island, Jefferson, etc. on the west side of Puget Sound
 - Non-Puget Sound communities (non-PS) are all counties not bordering the Puget Sound

Ferry Ridership – 2008/2018



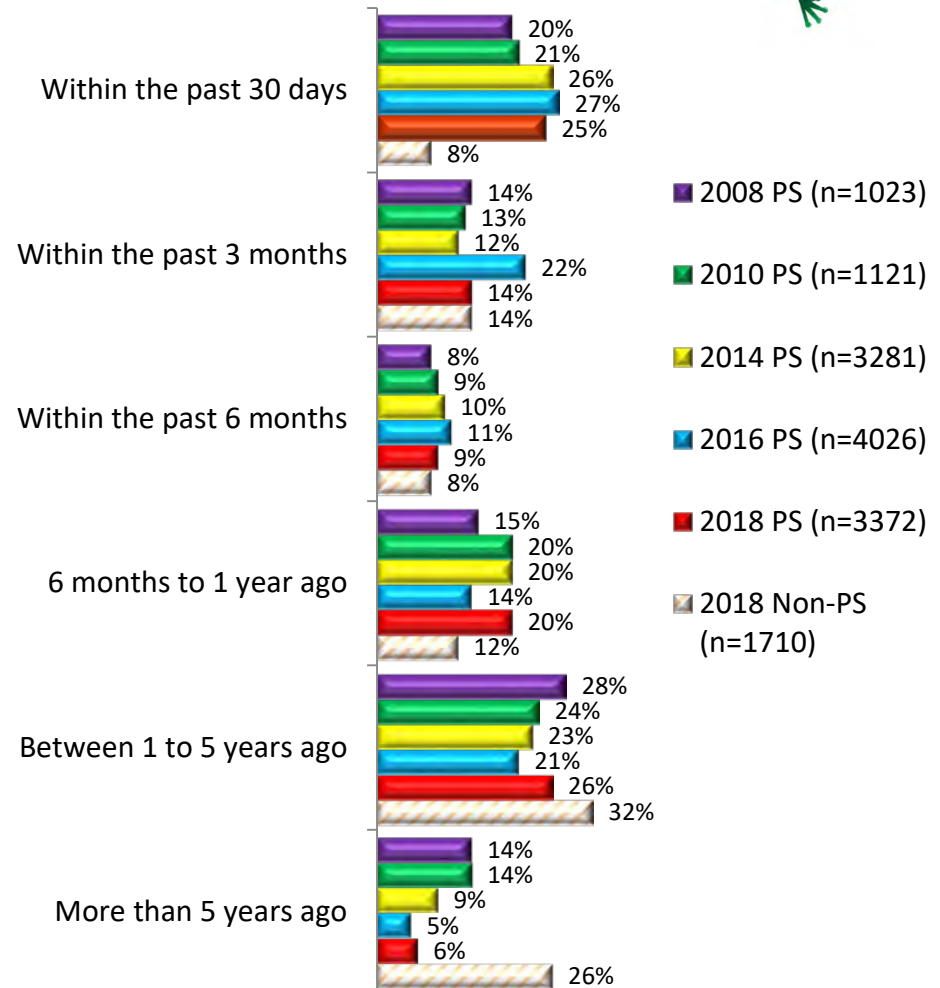
- ❖ Approximately 9 in 10 state residents (96%) in 2018 have ridden a WSF at some point in their lives.
- ❖ Puget Sound (PS) basin residents “ever” ridership in 2018 is 98% compared to non-Puget Sound (Non-PS) basin of 92%
- ❖ Timing of the last trip has been consistent since 2008 in the Puget Sound basin where two out of three have used WSF in the last 12 months.

Ferry Ridership (2008-2018)



Q1 Have you ever ridden a Washington State Ferry?
 Q3 When was the last time you rode a Washington State Ferry? Was it...

Last trip on WSF (2008-2018)

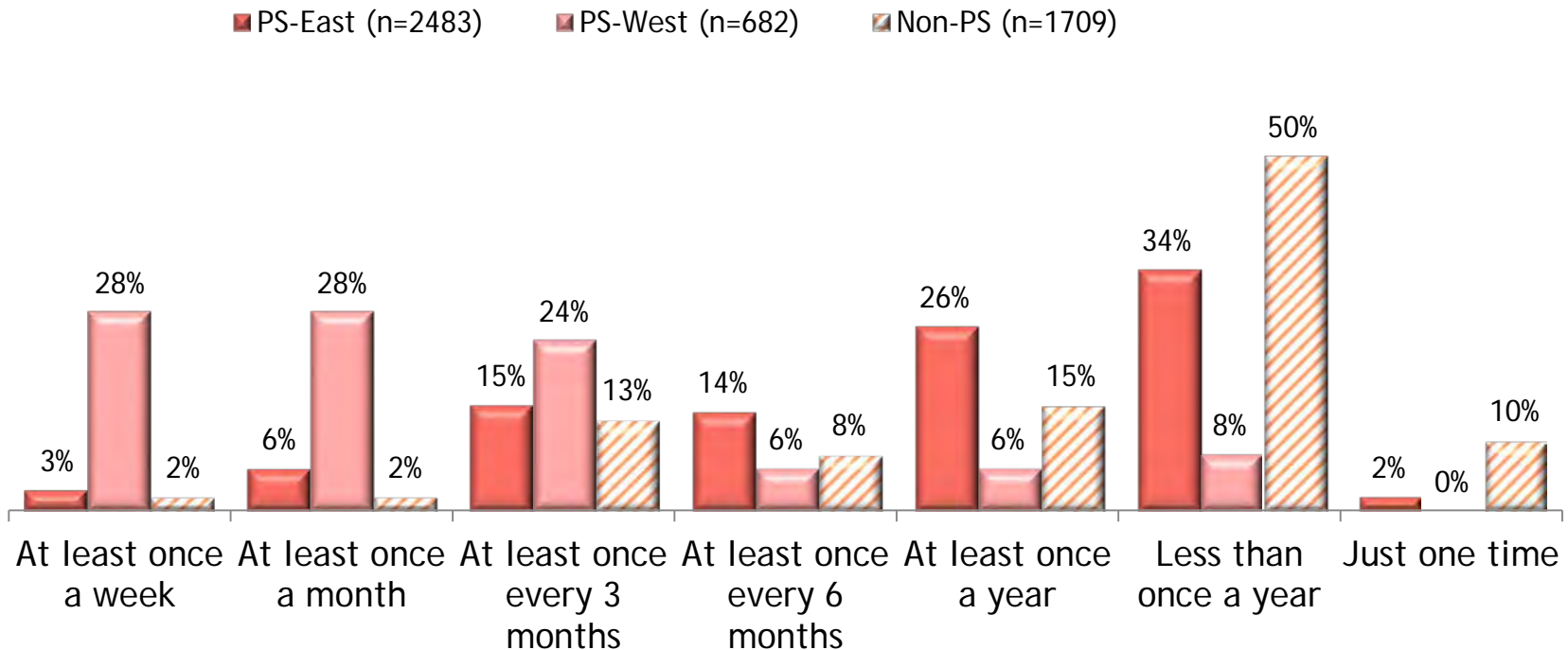


Travel Frequency – 2018 Overall



- ❖ Residents living in Westside communities in the Puget Sound basin have a higher travel frequency on WSF than residents living in Eastside Puget Sound basin communities or in Non-Puget Sound areas.

Travel Frequency (2018)



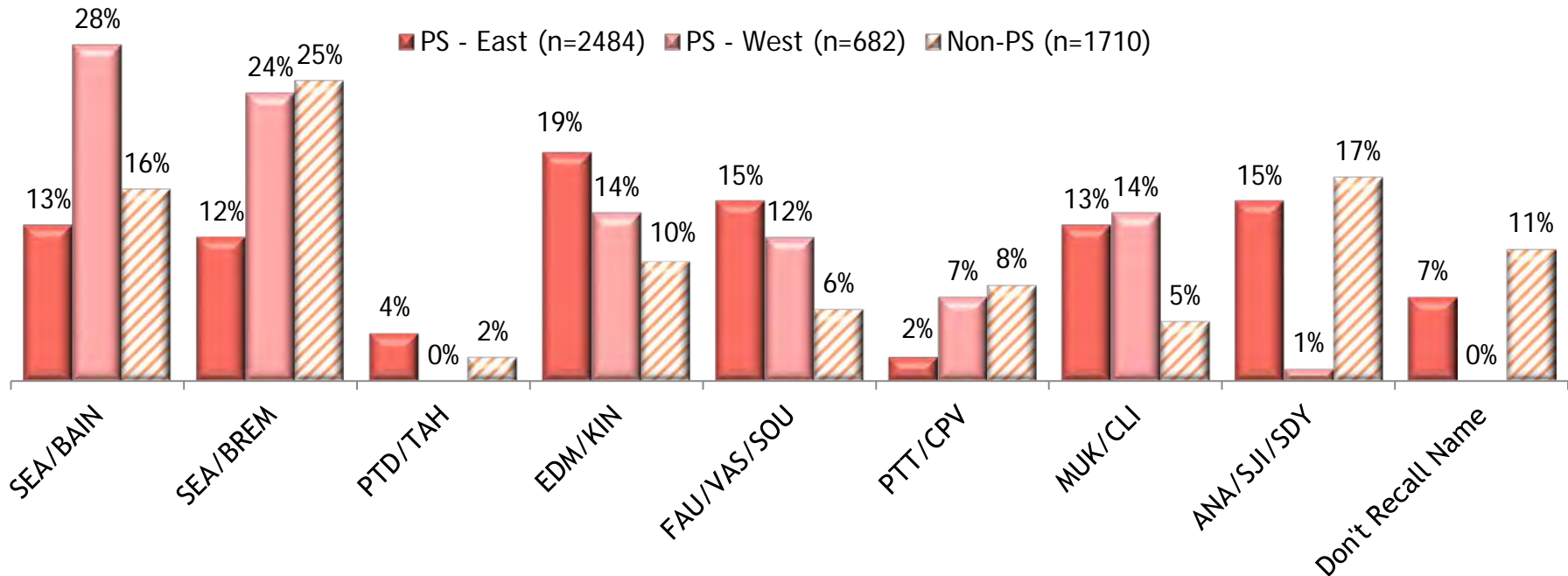
Q8 Approximately how often do you ride Washington State Ferries?

Last Route Traveled - 2018



- ❖ Residents in Westside Puget Sound basin communities tend to use Bainbridge (28%) and Bremerton (24%) more than their Eastside PS counterparts (13%, 12% respectively).
- ❖ Non-Puget Sound basin residents use Anacortes (17%) more often than their Westside Puget Sound counterparts (1% Westside).

Last Route Traveled (2018)



Q4 What was the last Washington State Ferry route that you took?

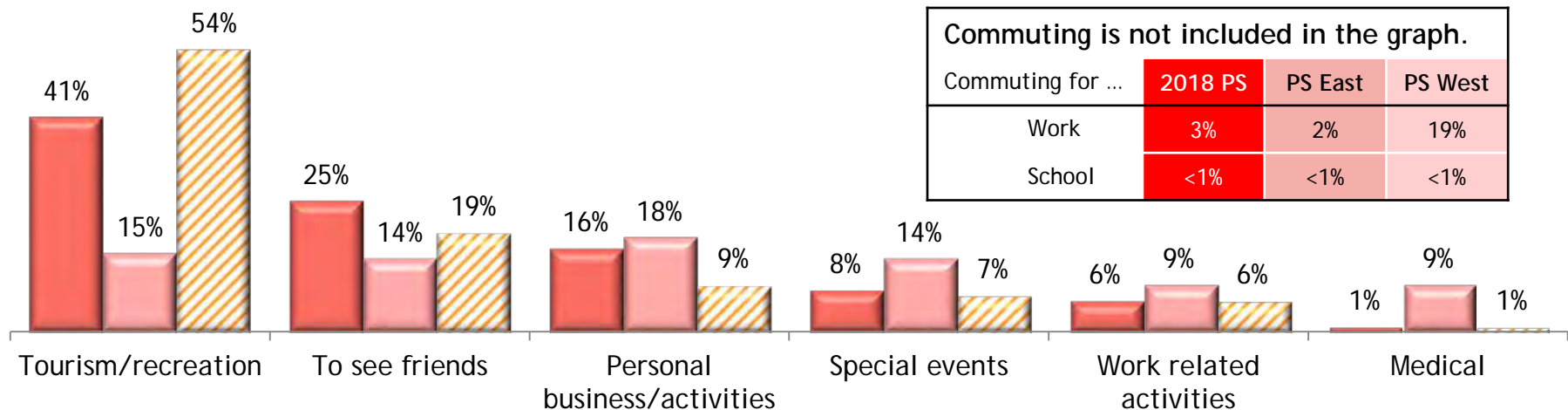
Last Trip Purposes - 2018



- ❖ Non-Puget Sound basin residents, like their Puget Sound basin Eastside counterparts, use the ferries more for tourism/recreation (54%, 41%) and to see friends (19%, 25%) than their Westside counterparts (15%, 14% respectively).
- ❖ Those living on the Westside use the ferries for work (19%) and medical (9%) more so than Puget Sound Eastside (2%, 1%) residents.

Most Frequently Mentioned Trip Purpose (2018)

■ 2018 PS-East (n=2483) ■ 2018 PS-West (n=682) ■ 2018 Non-PS (n=1709)



Commuting is not included in the graph.

Commuting for ...	2018 PS	PS East	PS West
Work	3%	2%	19%
School	<1%	<1%	<1%

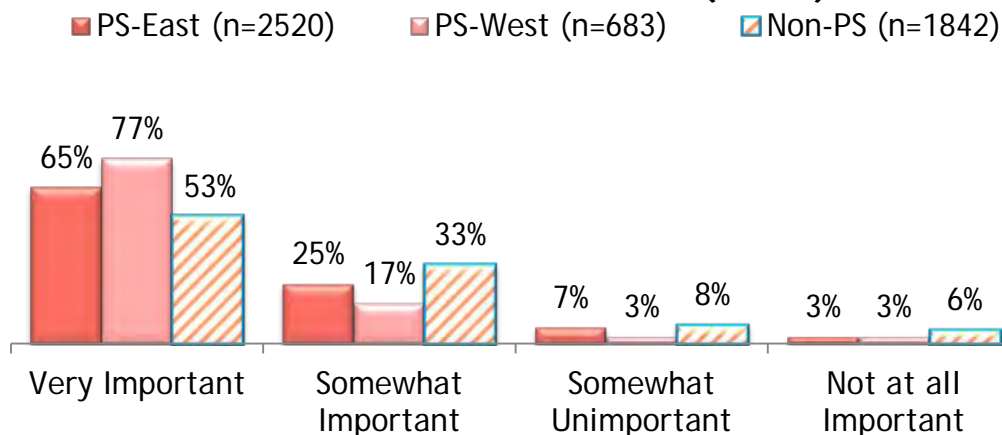
Q6 You said your last ferry ride was on the [INSERT RESPONSE FROM Q3] ferry. What was your primary purpose for that particular trip?

WSF Importance - 2018

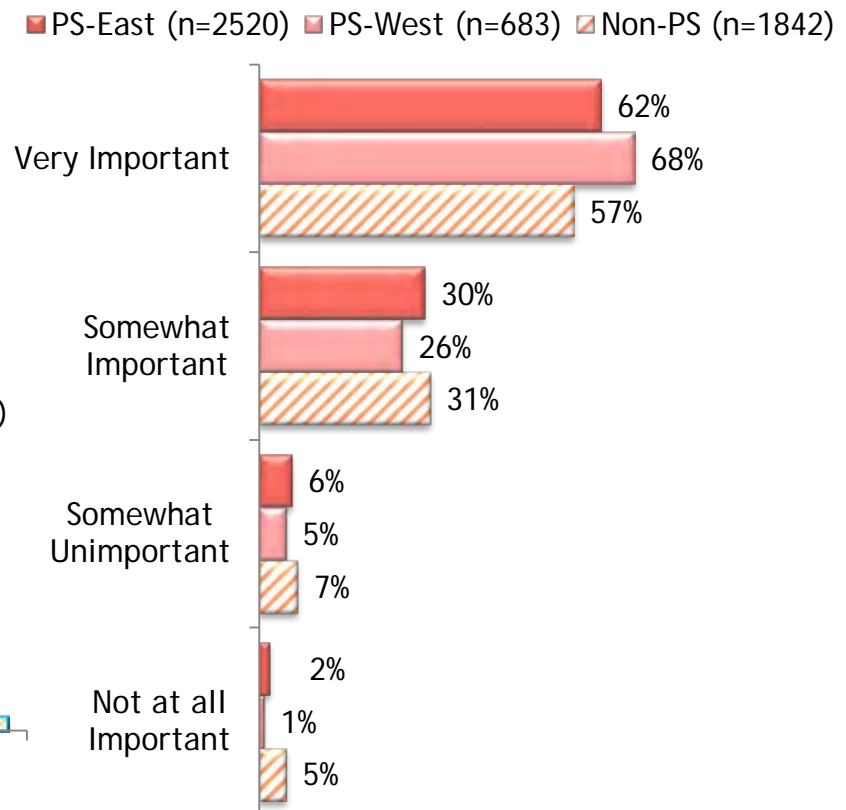


- ❖ About nine in ten citizens statewide perceive WSF to be important to the general Puget Sound economy/growth (89%) and PS tourism (90%).
- ❖ The perceived economic importance of WSF is only 4 percentage points higher in PS-East (90%) than Non-PS (86%).

Importance of WSF to Economy and Growth of the PS Basin (2018)



Importance of WSF to Encouraging Tourism in PS Basin (2018)



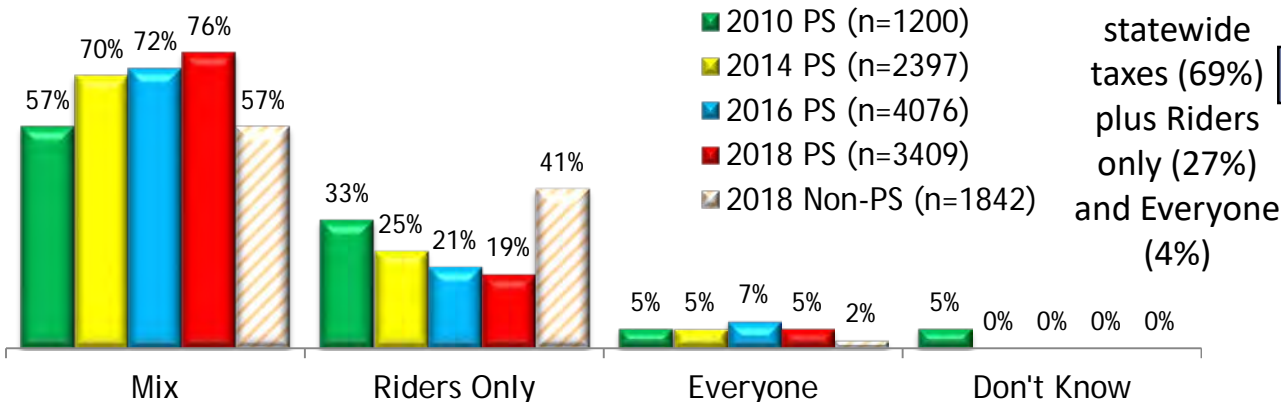
- Q15 Based on what you know, have read, or experienced, in your opinion, how important are Washington State Ferries to the general economy and growth of the Puget Sound region? Would you say...
- Q16 Based on what you know, have read, or experienced, in your opinion, how important are Washington State Ferries to encouraging tourism in the Puget Sound region? Would you say...

Operations Funding – 2010-2018



- ❖ Slightly more PS riders in 2018 (76%) than in 2016/14 (72%/70%) feel that daily operations should be paid for by a mix of rider's fares and gas taxes.
- ❖ Non-PS residents in 2018 as in 2016 are more likely (41%, 39%) to say "riders only" should pay the daily operation costs than their Puget Sound counterparts (19%, 21%).
- ❖ Statewide, about seven in ten (69%) say daily operations should be paid for by a mix (riders and everyone) and the rider portion of costs should be 63.3%.

How WSF Daily Operations Should Be Funded (2010 - 2018)



In 2018 citizens statewide suggested ferry riders should pay on average 63.3% of WSF's daily operating costs (58.2% PS, 71.6% Non-PS)

- Puget Sound Eastside residents report that riders should pay an average of 58.9%
- In comparison PS Westside residents said 51.6%, while Island dependent residents said 34.6%.

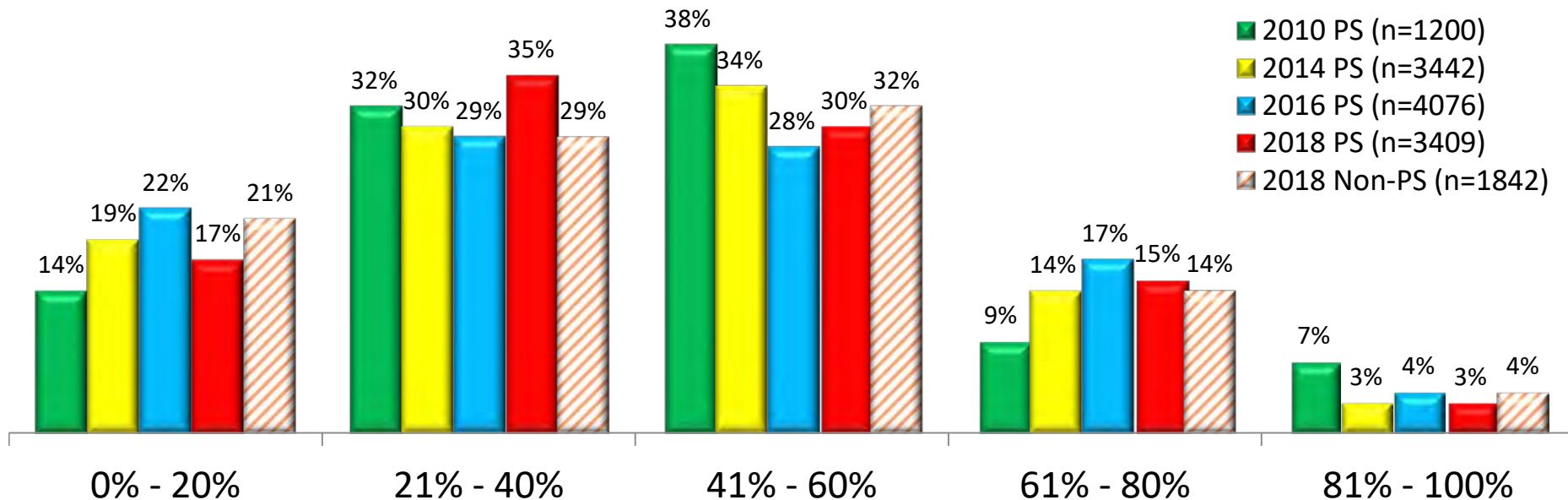
- Q17 Which of the following three ways to pay for the daily operations of the ferry system do you support the most? Do you believe that the cost of daily operations should be covered by:
- Q18 What percent of the daily operation costs do you feel riders should pay?

Operations Funding – 2010-2018



- ❖ On average, 2018 Puget Sound residents think that fares cover 43.1% of WSF's annual operating expenses (Eastside 42.6% vs. 48.4% Westside vs. 41.6% Non-PS regions).
- ❖ The average perception of how much fares cover has changed little between 2010 and 2018 within the Puget Sound basin.

How Much Do Fares Cover of Annual Operating Costs (2010-2018)



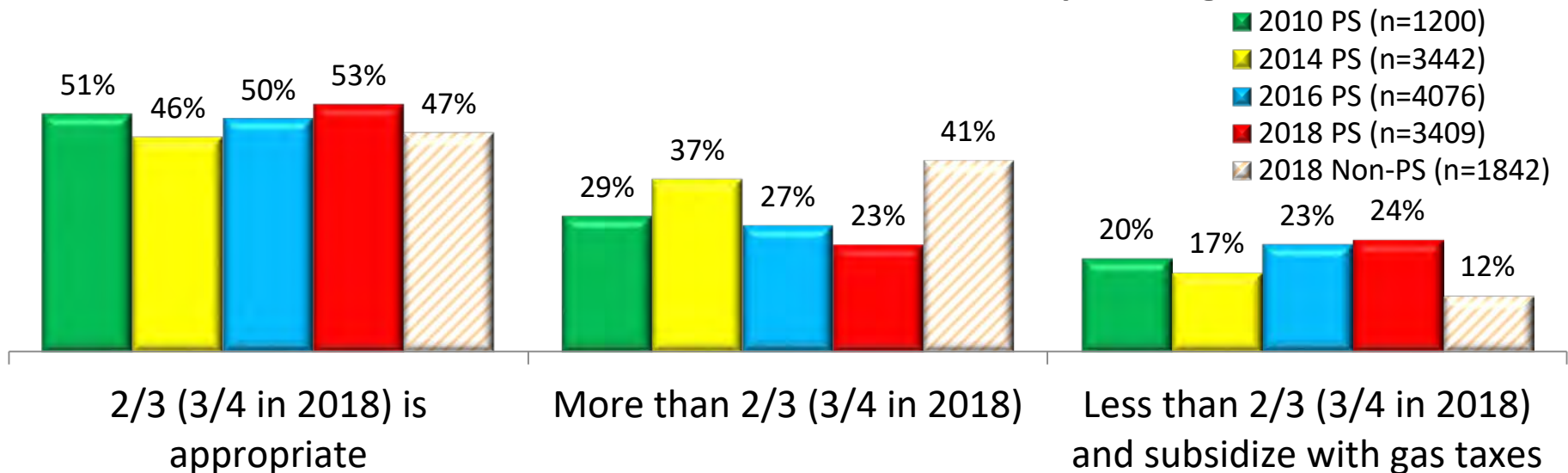
Q19 What percentage of WSF's annual operational costs do you think fares currently cover?

Fare Coverage – 2010-2018



- ❖ There is little change in what citizens feel is an appropriate farebox recovery at either the 2/3 or 3/4 cost of annual operations rates.
- ❖ Over four in ten (41%) Non-Puget Sound residents feel riders should pay more than 75% of the daily operating costs (down slightly from 43%).
- ❖ One-in-four PS residents feel riders should pay more (23%) while one-in-four feel they should pay less (24%) than 75% of the daily operating costs.

How Much Should Fares Cover of Annual Operating Costs



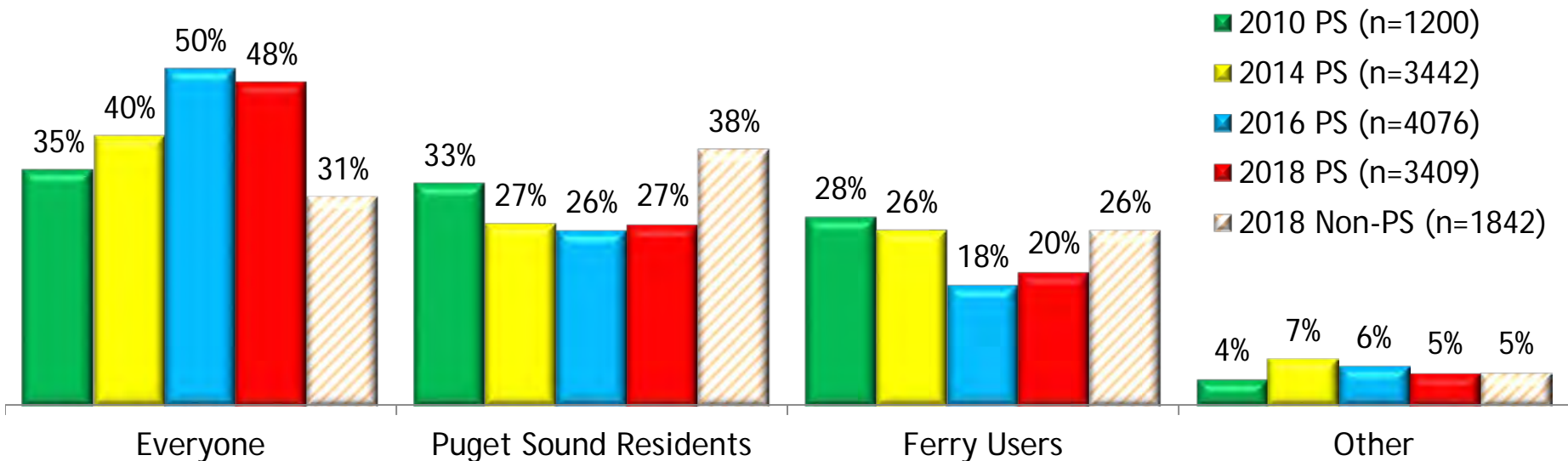
Q20 On average, fares cover about 75% (three-quarters) of the ferries' yearly operating costs. The other 25% (one-quarter) is subsidized by gas taxes raised from citizens across Washington State. Knowing that, do you feel ferry fares should cover a higher, lower, or the current percentage of yearly ferry operational costs?

Capital Funding – 2010-2018



- ❖ In 2018 as in 2016, non-Puget Sound residents are more likely to say “Puget Sound Residents” should pay for capital investments (38% - 2018, 36% - 2016) than their PS counterparts in either 2018 (27%) or 2016 (26%).

Who should pay for capital investments? 2010-2018



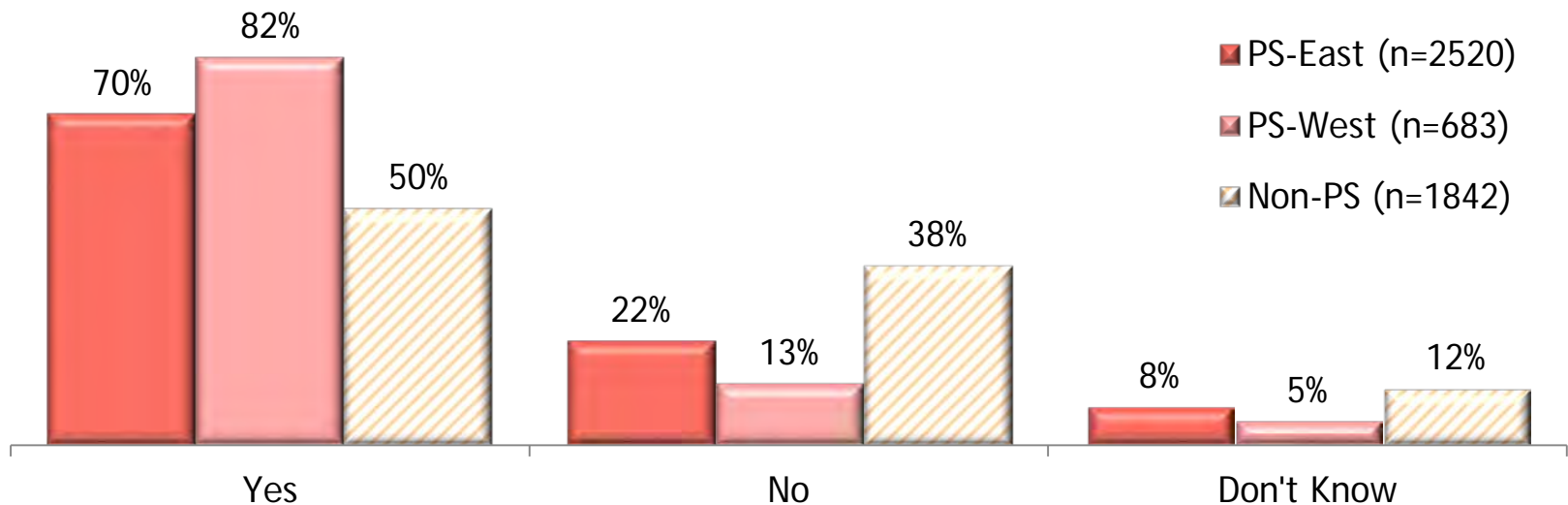
Q21 Daily ferry operations are one cost, and they are covered about 75% by ferry fares and 25% by state gas tax subsidies. But there is also a cost to build new ferries and terminals as the fleet ages. Like how capital investments in roads and bridges are paid for, funds can come from statewide gas taxes, regional taxes or local usage tolls. In order to pay for needed capital investments in the ferry system should the state raise the money from ...

Capital Funding Level - 2018



- ❖ Fifty percent or greater of all major regional groups feel funding for replacing old ferries and improving terminals should get the same level of statewide funding as replacing old bridges and improving highways.
- ❖ Non-Puget Sound residents (50%) are 20 to 30 percentage points lower on recommending same funding levels than both as PS-East (70%) or PS-West (82%) residents.

Same Funding of Old Ferries / Improving Terminals as
Old Bridges / Improving Highways (2018)

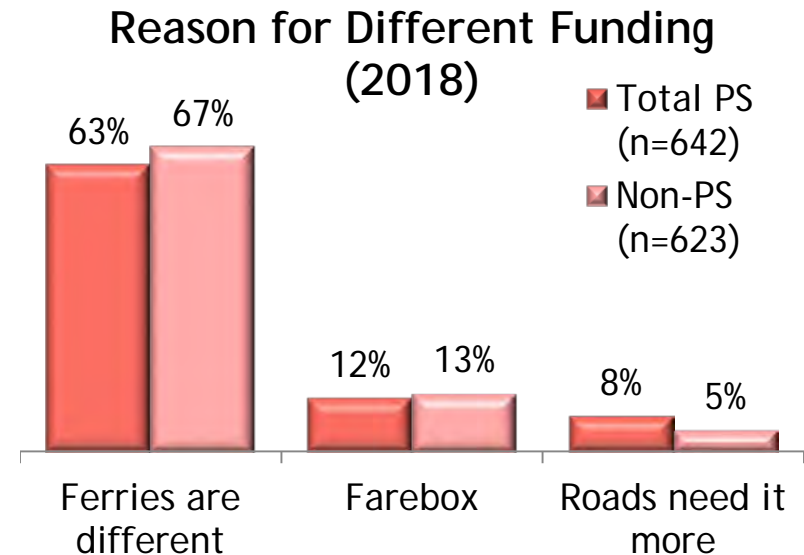
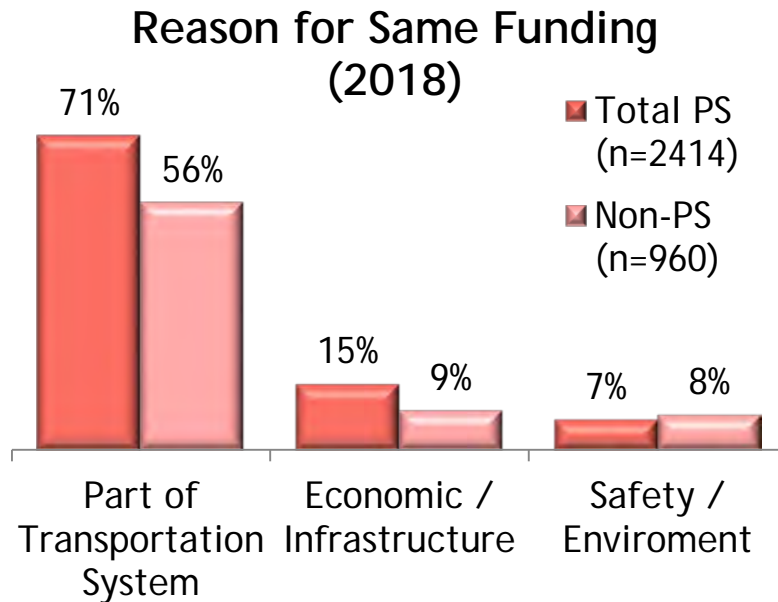


Q22 Should the replacing of old ferries and improving terminals get the same level of statewide funding as replacing of old bridges and improving highways?

Capital Funding Level Reason - 2018



- ❖ The major reason for recommending the same funding level is that WSF is part of the overall transportation system in Washington and should be funded equally with roads/bridges.
- ❖ The major reason for recommending different funding levels is that WSF is different than general roads/bridges as it carries a smaller percent of the state traffic and thus roads/bridges should get higher funding priority.



Q23 Why do you feel that way (regarding their answer to should the replacing of old ferries and improving terminals get the same level of statewide funding as replacing of old bridges and improving highways)?

Remaining Study Schedule



▶ **Remaining Studies:**

- **Reservation Study**

(currently in field)

- **On-board Non-FROG Recreational Study**

(currently in field)

- **Summer Period – Policy & Recreational Study**

(study conducted the end of September through October 2018)

- **Winter Period – 2019 Performance Study**

(study conducted the end of the 2019 WSF winter period – April 2019)

▶ **Consolidated Report:**

- **Covers All Seven 2017/2018 Studies**

(due in January 2019)



Questions?

THANK YOU!

For More Information Contact:

Reema Griffith, WSTC Executive Director

Bill Young, Survey Program Project Manager

360.705.7070